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ABSTRACT

Tuition aid plans that are contained in negotiated labor contracts covering one thousand or more workers were analyzed to describe their characteristics, identify barriers to worker participation, and recognize the benefits of giving employees financial aid to pursue courses offered on or off company or union premises. Procedures included a review of literature on the educational activities of workers and development of a conceptual framework for the process of tuition-aid utilization involving society, employers, unions, workers, and educators. Information was collected from matched pairs of fifty company and union officials and from 910 workers covered by the same contracts. Based on results, it is estimated that 1,600,000 workers are covered under 198 different negotiated tuition aid plans. Four types of plans were identified: tuition advancement or reimbursement, educational leave and leave-of-absence, training funds, and scholarship and educational loans. From the findings on the nature of negotiated tuition-aid in the private sector and the problems and barriers related to its use by workers, program and policy recommendations were formulated. Program recommendations focus on the need for new information delivery systems, for better counseling services, and for improvement of linkage between work site and educational providers. Policy recommendations point up need for additional research on aid and educational opportunities for adult workers, for a federal interagency panel on labor education, for greater collaboration between those initiating or operating tuition plans, and for better understanding of the issues by all members of society. (JT)

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An Untapped Resource: Negotiated Tuition-Aid In The Private Sector

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May 1978

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This report is the final report of the first phase of "A Study of the Use of Education and Training Funds in the Private Sector." The research reported herein was performed pursuant to a contract from the National Institute of Education, U.S. Department of Health, Education, and Welfare (Project Number 400-76-0125). Contractors undertaking such projects under Government sponsorship are encouraged to express freely their professional judgment in the conduct of the project. Points of view or opinions stated do not, therefore, necessarily represent official National Institute of Education position or policy.

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The definition and conduct of the study was facilitated by a National Advisory Panel of employers, union officials, and educators. It is inconceivable that research on a matter subject to collective bargaining could be carried out without the kind of support and assistance the panel provided.

PREFACE

The National Manpower Institute, under contract with the National Institute of Education, launched this study in the fall of 1976. It was the view of NIE in funding it, and NMI in bidding for the contract, that tuition-aid arrangements in industry were a great potential resource for increasing adult education and training opportunities.

Studies in recent years had reported that while the prevalence of tuition-aid programs is increasing, their use by eligible employees is minimal. The purpose of the NMI study was to determine the extent of utilization and to identify the barriers that tended to reduce worker participation.

Events since the initiation of this study have reinforced our original view that this is an important area for examination. Interest in tuition-aid plans continued to grow. While conducting the study, NMI found that businesses, unions, and educators share the view that these plans are critically important in providing education and training opportunities for adult workers. The notion of "lifelong learning" is becoming more prominent as a result of recent federal legislation and a host of new initiatives to bring education to the adult years of life. The "time trap" mentality that suggests education is only for the young, that the middle years are reserved only for work and the

later years only for leisure is giving way. In the quest for lifelong learning, tuition-aid emerges as a significant "untapped resource." The challenge that the National Manpower Institute intends to pursue is to make employees increasingly aware of the availability of tuition-aid and to seek ways to accommodate the existing gaps between potential employee interest and the use of such programs.

This study would not have been possible without the help of many people. These clearly include the employers, the union officials, and the workers who filled out our questionnaires and took time for interviews. Particular recognition, however, should be given to the National Advisory Panel, which was established to oversee all aspects of the study. The members of the panel -- representing corporations, labor unions, and educational institutions -- played a role far beyond that which is normal for advisory bodies. Their assistance, both collectively and as individuals, was invaluable

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CHAPTER I

INTRODUCTION

Worker education has a long history in the United States. It dates back to early colonial days when working men and women studied technical and cultural subjects to promote their education and advancement. The movement of worker education, however, had its permanent beginnings in the early twentieth century (Rogin and Rachlin, 1968).

During the last thirty years, especially dramatic changes have occurred in the content of worker education, its clientele, and its impact on workers' lives. After World War II, many veterans had a chance to go to college, when just a few years before that would have been an impossible dream for many of those who came from poor or working class families. Higher education was becoming a possibility for more members of society. During the post-Sputnik period, education assumed even more importance as a means of keeping pace. Many companies saw an urgent need for trained and skilled manpower to meet the challenge of a rapidly changing technology, and tuition refund plans grew in response to this need.

In the 1960s, the concerns of the previous decade were expanded. Higher education became more readily available to the poor and to minorities. Adult education received a new emphasis,

and labor unions began to negotiate for education provisions in their contracts. Concerns with equal opportunity brought new approaches to education and training. Apprenticeship programs contained special provisions to involve minorities, and affirmative action and upgrading programs were intensified. Information and technological complexity continued to increase the demands for education and management responsed by placing a new emphasis on education. In general, the sixties represented a great extension of educational opportunity to millions more Americans than ever before. The promise seemed more and more real that all citizens could avail themselves of the benefits of education.

The present decade has embodied different values for education, both in the general society and in the private sector. On one hand, recession has forced intensive scrutiny of all programs and elimination of many programs judged to be expendable. On the other hand, the cost of living and the difficulty of finding employment have made further education more essential and yet more difficult to obtain. Budget constraints have often forced working people and their children to reduce their educational efforts and aspirations. For some, tuition assistance is not simply a way to supplement a college education; it is the only way to achieve it.

The seventies are a time of more pragmatic concerns. There is a greater concern about the integration of work and education. No longer are duplications of educational funding and programs as readily tolerated by taxpayers, legislators, or administrators.

Education, within this new perspective, is viewed as an approach to the solution of problems, though not the sole solution. Workers, particularly young workers, do not see wages and hours as the sole concerns of negotiated contracts. Today they seek a whole range of benefits, including education. They recognize that job security includes finding ways to adjust to new technology or shifting economic conditions. Individual concerns with the quality of life and personal enrichment are joined with the concerns of how to acquire and hold a job.

We are presently witnessing a growing interest, on the part of educators, the federal government, and society in general, in the possibilities for increasing and improving the learning opportunities for adults. While adult education and learning are far from being as pervasive and universal as youth education, there are certain trends that suggest increased emphasis on adults and their educational and learning potentials. Adults are returning to the classroom in record numbers (Commission on Nontraditional Study, 1973). Many are pursuing these new opportunities for career reasons. At the same time, institutions of higher education, with the specter of declining youth enrollment staring them in the face, have been trying to attract a new adult clientele. New teaching methods, new delivery systems, and new support services and recruitment strategies have begun to emerge. Now more than at any other time in our history, colleges and schools are preparing to deal with the mature learner.

The expansion of educational opportunities to the adult learner is one of the primary goals of the lifelong learning legislation in the Educational Amendments of 1976 (United States Congress, 1976). The concept and programs of lifelong learning are particularly important in terms of existent and prospective patterns of career development. Currently people change jobs six to seven times in the course of a lifetime and change occupations two to three times. With a continued rate of job change and an increased life expectancy, this trend is likely to continue. Not only does this illustrate the need for workers to have periodic retraining and education, but it suggests a broader need for constant adjustment to changing job and social conditions through lifelong learning. The work place is an important arena for that to occur.

There have been and continue to be clear trends in the world of work and changes in society that have important implications for the education and training of adults. For workers, these have resulted in new collective bargaining agreements, new legislation and unilateral initiatives on the part of companies and unions to expand their educational opportunities. Although tuition-aid has existed since the turn of the century, it is only recently that this practice of providing assistance for workers to attend school has become widespread enough to attract serious national attention. Tuition-aid has the potential to meet the objectives of employers, unions, individual employees, and the education system. Employers seek improved skills in their work forces

and more satisfied employees; unions negotiated for tuition-aid to increase opportunities for their members; employees find new routes to career advancement or improved leisure skills; and educational institutions find a new source of students and revenue.

Surprisingly, however, tuition-aid in the private sector has been the subject of few systematic studies (O'Meara, 1970; International Union of Electrical, Radio, and Machine Workers, 1972; Levine and Cohen-Rosenthal, 1977; Lusterman, 1977; Fried, 1978; Haynes and Holly, 1978). While each of these studies has added to the growing knowledge base about tuition-aid, there is still a great deal to be learned about tuition-aid and its use. We do know that various forms of tuition-aid exist in a large number of companies, and we also know that utilization rates of these plans are very low.

What these studies suggest is that tuition-aid in the private sector is a virtually untapped resource for financing the educational pursuits of workers. That is, while tuition-aid plans are generally available to a large number of workers, their use has been limited to a very small percentage (and number) of workers. The primary purpose of this study is to identify barriers that limit the number of workers taking advantage of these benefits and to suggest ways to remove these barriers. This is not, however, a study of the entire tuition-aid system. Instead, it reflects the growing interest in and concern about the low rates at which workers, particulaly blue-collar workers, are taking advantage of negotiated tuition-aid opportunities.

This, then, is a study of negotiated tuition-aid plans in the private sector that cover one thousand or more workers. A study of this kind is important for a number of reasons. First, it seeks answers to questions about the range of negotiated tuition-aid plans and describes the basic characteristics of these plans. Second, it identifies barriers to worker participation in education and training and suggests ways of overcoming these barriers. Third, it makes tuition-aid more visible as a financial resource available to workers. Finally, and perhaps most important, it recognizes the beneifts of education for workers, unions, companies, and for society in general.

At a social level, educational opportunity affects the economic mobility of individuals within the work force. It provides a mechanism for minorities and women to advance, and it is an aid in the productive use of people and machines. On an individual level, educational opportunity may provide greater job security by increasing the range of marketable skills workers possess. Working people tend to have families, and educational opportunities may make them better parents and better models for their children to follow in their educational efforts. Further, educational opportunity can improve career development and foster personal growth among those who participate. Organizational behavior may be affect as well. Unions, by developing an increased awareness of education, may have a better-educated membership, and companies may have a better-educated work force.

Recent years have seen a significant growth in educational fringe benefits for workers that shows evidence of continuing. The existence of these resources and their use have considerable significance for society, the efficiency of the business enterprise, and the fulfillment and use of the talents of American workers. Little, however, is known about the full extent and character of these negotiated tuition-aid plans and the factors that determine whether workers participate in them. This study seeks to increase this knowledge base. By doing so, it will be important for both public and private decision making in the growing arena of educational policy and practice.

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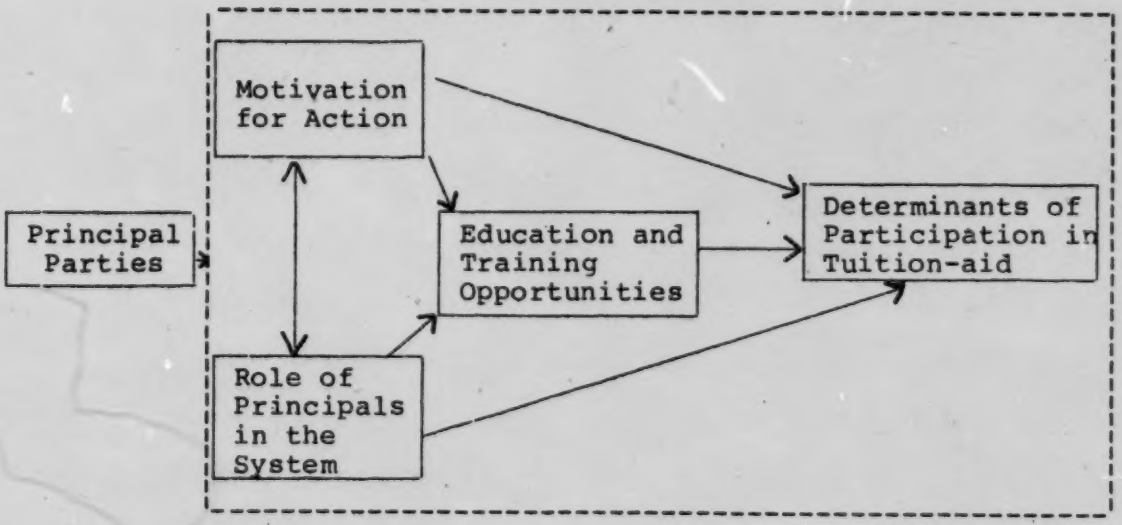
CHAPTER II

CONCEPTUAL FRAMEWORK

In this chapter, we present the conceptual framework that has guided this study of negotiated tuition-aid plans. The framework is intended as a basis for research and development on tuition-aid. It names the various principal parties involved--society, employers, unions, workers and educators--and tries to identify the major elements in the process of tuition-aid utilization.

EXHIBIT II-I

CONCEPTUAL FRAMEWORK


Motivation for Action
Principal Parties
Education and Training Opportunities
Determinants of Participation in Tuition-aid
Role of Principals in the System

The basic structure of the conceptual framework is presented in Exhibit II-1. As the exhibit shows, the framework has four interrelated components for each of the principal parties involved in tuition-aid plans. The four major components are the motivations for action, the role of the principals in the system, the education and training opportunities available, and the determinants of participation in tuition-aid plans.

Put as simply as possible, this study first identifies five principals in the process of tuition-aid utilization. Then it looks at the opportunities for education and training as a response to the motivations and roles of the various principals. Finally, the utilization of tuition-aid is seen as a function of the available opportunities as well as a function of the motivations and roles of the principals. A more detailed discussion of the major components of the study's framework follows.

This study of tuition-aid recognizes the importance of five principal parties in the development, operation, or use of education and training programs funded through tuition-aid plans. These are the society, employers, unions, workers, and educational establishments. Each of these principals has certain reasons (motivations) for being interested in tuition-aid and has certain roles in the development and operation of the education and training programs.

Society's motivation is to develop productive workers and effective citizens. Its role in this process is to help provide resources through tax deductions to employers, create a receptive

climate for education and training, and arbitrate disputes among the four other principals when such disputes are elevated to the political level.

Employers are motivated to provide education and training programs to improve worker productivity, meet skill requirements, and improve company relationships with workers. Their role in education and training is to expand the mandatory and optional training and education programs. Employers' decisions to expand such programs are based on manpower requirements that relate to specific firms and industries, personal development considerations, and negotiations with unions concerning the level of tuition-aid and conditions for its use.

Unions are motivated to support education and training programs to increase workers' personal satisfaction, career advancement, and job security. Their role in education and training is to represent workers' interests in expanding training and education opportunities through collective bargaining and to facilitate negotiation of opportunities, by workers themselves in some circumstances.

Workers' motivation to participate in education and training programs is to enhance their personal satisfaction, career advancement, and job security. Their role in the education and training process is to avail themselves of appropriate opportunities and to inform their unions and employers of their desires concerning the structure, content, and benefits of education and training opportunities.

Educators are motivated to establish education and training programs through their institutional role as agents that provide the education and training opportunities in response to society, employers, workers, and unions. They seek to increase enrollment of students, extend services to adult populations, and broaden the educational curriculum. Their role in providing such opportunities is to inform workers of available opportunities, deliver such opportunities to workers, and modify the curriculum based on worker needs and desires. An additional role of educational establishments is to raise expectations of workers, employers, and unions regarding the relationship of training and education to work.

The motivations for action and the roles of the principals affect the number and characteristics of educational and training programs available. That is, each principal translates its motivations and roles into education and training opportunities or affects those that are available. Society tends to influence available opportunities in the private sector through provision of greater rewards to more educated workers and provision of incentives to expand and increase utilization of private training and education. Employers expand the availability of opportunities based on manpower requirements in the firm and industry, on worker personal development, and on the relationship between worker productivity and educational costs borne by employers. Unions expand education and training opportunities by placing pressures

on management for liberal tuition-aid plans within the context of total management resources, degree of worker interest, and desired allocation of the wage package. Unions also provide an oversight function on plan administration. Workers decide to participate in education and training programs based on a variety of factors including structural barriers in the work place, social and psychological variables, and perceptions of promotion opportunities. Educators are agents that provide education and training opportunities in response to the requirements of the society, employers, and unions and to the needs of the workers.

Finally, the available educational opportunities and the motivations and roles of the principals determine the level of utilization of tuition-aid plans. Conditions related to each of these determinants are traceable to the motivations or roles of the various principals in the development of education and training opportunities. For example, both society and employers help establish the level of utilization by the importance they attach to worker training and education; the financial incentives provided to workers such as release time, stipends, and sabbaticals; and the nature of the information available to workers about the structure and content of tuition-aid plans. Unions can affect levels of utilization by their willingness to bargain for tuition-aid plans and by the relative importance they place on tuition-aid in relation to other negotiated fringe benefits. Workers affect the participation level by their desire for additional education and training and by their feelings of inadequacy and anxieties

about further schooling. Educators, by providing the desired curriculum to workers and by being responsive to the needs of adult learners, can also affect levels of participation in tuition-aid plans.

For simplicity, these determinants of levels of utilization of tuition-aid are grouped into three broad categories: structural determinants, which are plan or program characteristics that can affect participation; social determinants, which reflect societal, organizational, family, or peer values and attitudes that can limit or enhance participation rates; and psychological determinants, which refer to individual worker perceptions about education or learning that can affect participation decisions.

One additional comment about the conceptual framework is necessary. The entire process of tuition-aid utilization is dynamic and, as such, feedback points in the process can be identified. The feedback system is composed of two parts. First, the translation of the roles of the principal parties into education and training opportunities is a sequential process in which the different principals initiate action or respond to actions initiated by other principals. In this feedback system, society and employers determine the initial availability of education and training opportunities. These opportunities are developed and delivered by educational institutions, and workers choose to participate in some and not in others. Educational institutions then adjust their course offerings and curriculum in response to worker choice and desires. Second, a feedback system that can

directly affect participation rates in tuition-aid plans is possible. As determinants of levels of utilization are identified and confirmed, possible solutions can be reviewed and program adjustments made. This review and adjustment process would exist at the local level, where tuition-aid plans are implemented, and would involve employers, unions, workers, and educators. The process would result in an alteration of the education and training opportunities available, which in turn should affect the levels of participation in tuition-aid plans.

This conceptual framework served as a guide for the design of the study. By identifying the important principals and the critical elements in the process of tuition-aid utilization, the framework was used to structure the information gathering and analyses required in the study. In addition, the framework was used to identify where in the process specific interventions are most appropriate. Finally, the development of the conceptual framework and its use as a guide in designing and undertaking the study increased our awareness of the very complex nature of negotiated tuition-aid in the private sector.

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CHAPTER III

LITERATURE REVIEW

A review of literature on the educational activities of workers reveals much of pertinence to the subject of tuition-aid in industry. Not only does the literature put the development and utilization of educational benefits in a historical framework, but it addresses current issues of particular relevance to this study, such as worker perceptions of barriers to the use of education and training opportunities. A number of works define the present scope of tuition-aid plans, while others focus on the benefits and implications of increased use of such plans. This chapter summarizes findings from the literature that are of significance to the questions and issues raised in the study.

Educational Benefits in the Historical Perspective

An examination of the historical development of labor education indicates that the provision of educational fringe benefits has expanded in response to the needs of both labor and management (Levine, 1970).

A number of works attest to the long-standing interest of organized labor in education for its members (see Curoe, 1926; Barbash, 1955; Mire, 1956a, 1956b; Kerrison and Levine, 1960). This interest has been evident since the 1800s, whether

as a desire for vocational training (American Federation of Labor, 1939), as a vehicle for social change (Dwyer, 1977), as a tool for the development of more effective unionists (Brameld, 1941; Lawrence, 1945), or as an aid in the development of the "whole man" (Kerrison and Levine, 1960).

Most company-sponsored plans originated after World War II, though the first plans began in the early 1900s. The impetus for the development of union-negotiated tuition-aid plans was the growth of fringe benefits, a variety of social benefits which increasingly became part of collective bargaining agreements (Levine, 1970). These benefits helped union members meet personal and family needs; they also aided management by serving as a cost-effective means of ensuring loyal, healthy, and satisfied workers.

As educational and training requirements for jobs have steadily increased (since World War II), a college education has come to be seen more and more as a basic need rather than a privilege, and thus educational assistance programs are a part of employee benefit packages (Abramovitz, 1977). Tuition-aid programs, while apparently underutilized, are increasingly seen to be of crucial importance in meeting rising tuition costs of working part-time students.

Current Scope of Tuition-Aid in Industry

Surveys have been conducted that offer some idea of the prevalence of educational plans in industry, the degree of their utilization, and the nature of their provisions.

In recent surveys, almost 90 percent of companies polled had tuition-aid programs (Bureau of National Affairs, 1975; Lusterman, 1977), whereas in 1957, only 63 percent of companies had such programs (Bureau of National Affairs, 1975). Large companies were more likely to have tuition-aid plans than smaller ones (Bureau of National Affairs, 1972; Lusterman, 1977), and plans were most prevalent in financial institutions, utility companies, and transportation and communications firms (Lusterman, 1977). About four-fifths of industry expenditures on education, however, went toward in-house training activities rather than for external educational activities (Lusterman, 1977).

Despite the large number of company-sponsored education programs, negotiated tuition-aid contracts are still relatively rare. A 1974 study of 1,550 major collective bargaining agreements covering 1,000 or more workers showed only 60 agreements with tuition-aid provisions, covering 862,350 workers (U.S. Department of Labor, 1975). (The study, however, found 558 on-the-job training provisions, 65 educational leave of absence agreements, and 99 general training provisions.)

Studies of the rate of worker participation in tuition-plan programs have placed average rates at between 4.4 percent (O'Meara, 1970) and 10 percent (Bureau of National Affairs, 1972), confirming fears that educational benefits may be underutilized.

The O'Meara study (1970) documented common plan provisions. The majority of plans surveyed were open to active, full-time employees; confined study to nonwork hours; and covered about 80

percent of tuition costs. Another survey found that more than three-fourths of plans required courses to be job-related (Bureau of National Affairs, 1972).

Benefits and Implications of Worker Participation in Education and Training

Throughout the literature, much reference is made to presumed positive outcomes of worker utilization of educational benefits. The literature cites a wide range of potential benefits, and stresses the fact that educational plans serve the needs of both labor and management.

The majority of adult participants in education, especially males, are motivated by job-related concerns (Okes, 1974; Botsman, 1975). Desire for job promotion and career advancement has been and remains a commonly cited motivation for participation in educational plans (Baker, 1939; Okes, 1974), and such participation is said to lead to improved job performance and enhanced promotional potential (Davis, 1935; Board for Fundamental Education, 1968; O'Meara, 1970; Bureau of National Affairs, 1975; National Commission on Productivity and Work Quality, 1975). Other returns from employee utilization of educational opportunities include increased general knowledge (O'Meara, 1970), improved worker morale (Bureau of National Affairs, 1975), increased job satisfaction and personal development (Speer, 1976), and salary increases and personal advancement (National Commission on Productivity and Work Quality, 1975).

Employers offer tuition-aid plans primarily in order to combat outdated knowledge (O'Meara, 1970; Levine, 1977b). This upgrading of employee training raises the general standard of work and enhances productivity (Davis, 1935; National Commission on Productivity and Work Quality, 1975). Tuition-aid plans also benefit companies' employee and community relations, aid in recruitment efforts (Bureau of National Affairs, 1975; Abramovitz, 1977; Sheerin, 1977), and reduce turnover (O'Meara, 1970).

Some writers stress the organizational and societal impacts of worker utilization of education, rather than the returns to individual groups. Charner (1977) points out that worker education, in addition to affecting individual employees, may affect the work place, the labor market, and educational institutions as well. It can induce structural changes such as flexible scheduling of classes; a restructuring of the work day; and increased social and work interactions among workers, management, and educators. Education of workers benefits the entire community by helping to break down the barriers between education and work and by encouraging flexible life patterns (Organization for Economic Cooperation and Development, 1975).

Barriers to Worker Utilization of Educational Opportunities

In light of the generally accepted notion that education and training opportunities are underutilized by workers, attempts have been made to assess obstacles or barriers to their participation in educational plans. Though there is much overlap, barriers

can be grouped roughly into three categories: psychological, social, and structural.

Blue-collar workers' fears of failure and low self-confidence about their learning abilities appear to inhibit participation in education (London and Wenkert, 1964; Botsman, 1975). London and Wenkert (1964) also discuss attitudes and stereotypes held by blue-collar workers that may prevent them from utilizing education. Many feel that they are too old to go to school, that schooling is too costly anyway, and that they, as workers, do not possess the intellectual capabilities it requires. The common mythology about blue collar workers tends to support this, viewing them as basically apathetic and unintellectual (London and Wenkert, 1964).

A number of social factors are said to serve as obstacles to greater worker participation. Blue-collar work is often physically exhausting and time-consuming, leaving little time or energy for the pursuit of education (London and Wenkert, 1964; Botsman, 1975). Women, particularly, are often too burdened by home or child care responsibilities to take advantage of educational opportunities (Bostman, 1975).

Structural factors such as tuition costs (Botsman, 1975) and scheduling and location of classes (Franklin, 1976) are often cited as important barriers to worker participation in education. Some state that companies have established restrictive educational policies without union involvement and have not allowed for worker scheduling adjustments or flexible course content

requirements (Levine, 1973; 1977a; Centre for Educational Research and Innovation, 1976, 1977). Also, many workers lack awareness or specific information about tuition costs, plan provisions, and educational opportunities in their area (London and Wenkert, 1964; Botsman, 1975; Franklin, 1976). Inadequate information is commonly viewed as one of the more significant inhibitors of greater worker utilization of education.

Experimentation in Altering the Level of Worker Participation in Education Programs

Several experimental projects at individual plants have been successful in raising the levels of worker utilization of education. The results of these projects, along with an assessment of important barriers, suggest future directions for research and demonstration efforts.

The Educational Advancement Program of the International Union of Electrical, Radio, and Machine Workers (IUE) ran from 1969 to 1972 and demonstrated that unions are important for recruiting workers into educational programs (IUE, 1972). An education and training program was set up, with management cooperation, and union education counselors were used in the plant to recruit members and to provide information and guidance. Among the benefits of the program cited by the IUE was the development of a large, organized, and motivated group of students.

Max Schoenfeld (1967) describes a notable example of a labor-management effort that significantly raised participation rates in a tuition-aid plan negotiated between the United Auto

Workers (UAW) and a General Motors plant in Cleveland. The effort involved establishing a branch of a private technical school in a UAW union hall. The UAW Education Committee then publicized the school, helped students with applications, and provided tutoring. Classes were scheduled around work shifts. GM launched a publicity campaign and set up an education information center in the plant cafeteria. From 1965 to 1967, participation rose from five employees to more than 150.

Finally, the Kimberly Clark Corporation, often cited for its liberal company-sponsored plan, found that the participation rate for its tuition-aid plan jumped from 1 to 30 percent when the requirement that courses be job-related was dropped (Washington Star, 1976). Other aspects of the plan that the Kimberly Clark management feels enhance participation are strong publicity and promotion of the plan and advance company payment of full tuition costs, with no required proof of completion or satisfactory grade level (Sheerin, 1977). Currently, 38 percent of the eligible 7,000 employees are involved in some aspect of the Kimberly Clark Educational Opportunities plan (includes tuition-aid, family education savings, and paid educational leave).

A review of the literature on the educational activities of workers suggests that future efforts could include experiments with the addition of counseling and informational facilities. Not only is this perhaps the "easiest" change to bring about, but it would seem to go a long way toward reducing some important worker-perceived barriers. Alteration of structural barriers

could involve changes in plan provisions and coverage, rescheduling classes or work shifts, and shifting location of classes. The social and psychological barriers may be the most difficult ones to address. To reduce these would involve, for example, a reworking of social roles (child care responsibilities, the nature of jobs, etc.) and an attempt to change long-held beliefs about education and work.

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CHAPTER IV

NEGOTIATED TUITION-AID PLANS

It is estimated that there are 198 negotiated tuition-aid plans in the United States that cover approximately 1,600,000 workers.[1] Tuition-aid should therefore be considered a viable means of financing access to education for a large number of adult workers. Earlier reports (see O'Meara, 1970; Lusterman, 1977) have provided information on the nature of tuition-aid plans, but these studies fall short in their ability to assess the true state of tuition-aid in the private sector and in their analyses of existing tuition-aid plans. In this chapter, we present current information on tuition-aid plans covering one thousand or more workers and an analysis of these plans.

Types of Tuition-Aid Plans

A negotiated tuition-aid plan is any formal plan in which a company has agreed, within the terms of a company-union contract, to give employees financial aid to pursue courses offered on or off company or union premises. Four distinct types of plans have been identified: tuition advancement or reimbursement plans;

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[1]This estimate is for negotiated plans that cover one thousand or more workers. The estimates were derived from information in the files of the Bureau of Labor Statistics. See Chapter 2 of the Technical Appendix for the procedure used to arrive at these estimates. The Technical Appendix is available from the National Manpower Institute.

educational leave and leave-of-absence plans; training fund plans, and scholarship and educational loan plans. (Apprenticeship programs were not included.) What follows is a general description of each of these plans. Usually only one of the four types of tuition-aid plans will appear in a negotiated agreement. There are, however, a number of cases in which the combination of two or more plans can be found. Since the elegibility criteria, the acceptable courses and institutions, and the procedures for applying and gaining approval are similar for all programs, we present a detailed description of tuition advancement/reimbursement plans and then discuss only the unique features of the other three types of plans.

A. Tuition Advancement or Reimbursement Plans

Tuition advancement/reimbursement is the most common form of tuition-aid negotiated between companies and unions. These plans pay all or part of the tuition and related costs for enrollment in education or training programs outside of the company. Advancement plans are less commonly found than reimbursement plans. Employees are usually reimbursed by the company after satisfactory course completion and evidence of tuition payment. Satisfactory course completion is generally whatever the educational institution considers "passing." In some instances, grade requirements are specified, usually "C" for vocational, technical, and undergraduate courses and "B" for graduate courses. Tuition advancement is provided in only a few instances, sometimes

as part of the same contract as a reimbursement program. In these cases, an employee may be advanced part of the education related fees and reimbursed for the remainder upon satisfactory completion.

Tuition advancement/reimbursement plans usually cover all or part of the mandatory fees for registration, student activities, laboratory work, and graduation expenses. Books and supplies are sometimes covered, as are the costs of the College Level Examination Program (CLEP) and reasonable transportation and meal costs. The type of course work can influence payments. Degree or diploma programs normally receive higher levels of payment than nondegree course work. Also, job-related education receives higher payments than education unrelated to opportunities within the company. In some plans, pay schedules are adjusted based on salary or length of service in the company.

Most negotiated advancement/reimbursement plans have three eligibility criteria: workers' job classification, accrued seniority, and satisfactory course completion. Most plans allow all active employees (those currently working and not on leave or layoff status) to participate. In some cases, however, employees on leave or who have been laid off are entitled to these benefits. Seniority seems to minimally affect these benefits, with most plans requiring one year or less of service before a worker becomes eligible. Satisfactory course completion is required for most reimbursement plans.

Tuition advancement/reimbursement plans often specify the types of institutions employees may attend and the kinds of courses they may study. Acceptable institutions often include universities and colleges, community colleges, technical and vocational schools, high schools, professional societies, labor unions and trade associations, and correspondence schools. Contract provisions usually list acceptable courses and state whether the course must be for credit, job- or career-related, or degree-related.

While time off is not allowed in most plans, employees are often free to trade shifts or have their work schedule adjusted to accommodate their educational schedule. As a safeguard, program provisions often stipulate that course work should not affect employee performance on the job.

B. Educational Leave and Leave of Absence Plans

Educational leave is granted to a worker for educational purposes for a specified period during working hours, while leave of absence is usually granted for an extended period of time. Under either type of leave provision, partial or full tuition payment may be included. Under leave of absence provisions, the time spent on educational leave is usually credited as continuous company service for pension rights, and many companies will reinstate the worker at the current job classification, depending on seniority and job availability.

Eligibility criteria and the criteria for acceptable courses and institutions are similar to those detailed under the advancement/reimbursement plans.

C. Training Fund Plans

In training fund plans, employees contribute fixed amounts of money per employee into a central fund to finance education and training opportunities for employees. These funds are usually administered by a board of trustees as part of an industry-wide or area-wide program. The trustees arrange for training facilities and staff and plan the programs and the curriculum. Often, the fund is used to establish a training institute or school. The objectives of most training funds are to improve performance of employees on the job, to upgrade skills, to retain workers, and to reduce educational costs for employees.

D. Scholarship and Educational Loan Plans

By far the smallest in number are programs that offer scholarships or loans. Under scholarship programs, eligible employees are given funds to cover costs related to education or training pursuits. Educational loan programs on the other hand, lend money to workers and require the repayment of the loan according to some agree-upon schedule.

In summary, employees under tuition aid plans can (1) receive funds through advancement or reimbursement plans or as scholarships or loans, (2) get time off to pursue educational activities as part of educational leave plans, or (3) receive specific skills training at institutes set up under training fund plans.

Tuition-Aid Plans -- Specific Characteristics

Chapter 4 of the Technical Appendix details the procedures used to collect information about negotiated tuition-aid plans. We were able to identify 136 specific negotiated tuition-aid plans and were able to obtain detailed information on 79 of these. These 79 plans comprise the sample used in the description that follows.

EXHIBIT IV-I

NUMBER OF PLANS UNDER STUDY THAT CONTAIN EACH TYPE OF TUITION-AID PLAN

Type of Plan	Number of Each Type of Plan[1]
Tuition Advancement/Reimbursement	60
Leave Plans	13
Training Fund Plans	22
Scholarship or Loans	6
Total	101

We see from Exhibit IV-1 that tuition advancement/reimbursement is the most common form of tuition-aid.[2] In fact, more than 75 percent of the agreements have an advancement/reimbursement

[1]The total is more than 79 because in some instances more than one plan is part of a negotiated agreement.

[2]Chapter 3 of the Technical Appendix presents, in tabular form, the detailed characteristics of all of the tuition-aid plans by type of plan.

provision. Of the sixty plans that provide tuition advancement/reimbursement, we find that fifty-four only reimburse employees, three will advance funds, and three provide both forms of assistance. This suggests that both within this type of plan and for tuition-aid plans overall, reimbursement is the primary mode of benefit.

EXHIBIT IV-2

DISTRIBUTION OF NEGOTIATED TUITION-AID PLANS BY INDUSTRY

Industry	Absolute Number	Percent
Manufacturing	43	54%
Transportation and Utilities	14	18
Services	15	19
Construction	7	9
Total	79	100%

Exhibit IV-2 shows that negotiated tuition-aid plans are found in all types of industries. This distribution approximates that of unionized workers by industry, with the largest percentage of negotiated plans (54%) found in manufacturing.

Finally, we find differences in the actual and average number of workers covered under each type of plan. More than 300,000 workers were covered under tuition advancement/reimbursement plans, while for educational leave and for training fund plans, 100,000 workers were covered. However, more workers, on the average, were covered under plans with educational leave and training fund

provisions (10,000 per plan) than with tuition advancement/ reimbursement provisions, which average 6,000 workers per plan.

CHAPTER V

STUDY METHODOLOGY

In order to better understand the nature of tuition-aid plans that have been negotiated between companies and unions, we need information from a number of sources. Recognizing this need for a comprehensive data base, we gathered information from company and union officials and from workers through two separate surveys. Data collection for the study began with telephone and letter contacts to government agencies and union headquarters in an attempt to identify existing tuition-aid plans. The study called for analyses of tuition-aid plans that are contained in negotiated labor contracts that cover one thousand or more workers. Once these plans were identified, the companies and unions were contacted to formally ask them to participate in the study. In the first survey (Survey I), information was collected from company and union officials concerning tuition-aid programs at their local site. A second survey (Survey II) collected information from workers about factors that affect their participation in tuition-aid plans.[1]

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[1]In addition, interviews were conducted at three sites to collect in-depth information about the tuition-aid plans from workers, plant officials, union officials, and educators. The findings from these interviews are presented in Chapter 9 of the Technical Appendix.

The Survey of Company and Union Officials

The survey of company and union officials gathered information about the operation of existing negotiated tuition-aid plans and measured the attitudes of these officials about plan objectives and about the relative importance of possible barriers to increased worker participation in their tuition-aid plans.[1]

Survey I began with the identification of unions with negotiated tuition-aid plans that covered one thousand or more workers. A sampling plan was then prepared, company and union participation solicited, and the survey undertaken.

To identify the unions with negotiated tuition-aid plans, NMI contacted organizations that collect information about negotiated plans or are familiar with the organizational structures of American unions. These organizations were the Labor-Management Services Administration and the Bureau of Labor Statistics, both of which are a part of the U.S. Department of Labor, and the American Federation of Labor and the Congress of Industrial Organizations (AFL-CIO), the largest American federation of unions. The information these organizations provided was useful but was not complete or current enough to reference all plans within the scope of the study. Therefore, a complete survey of all 224 national/international unions and a five percent sample survey of independent local

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[1]A more complete description of the methodology for this survey appears in Chapter 4 of the Technical Appendix.

unions became necessary.[1] Through a lengthy procedure of letters and telephone calls, 136 different contracts were identified that covered one thousand or more workers and contained negotiated tuition-aid plans. Initial agreement to participate in the study was obtained from the company or union officials at plants covered by 79 of these 136 major contracts.

A company-union contract can cover workers at one or more locations. For the purposes of this study, a locally negotiated contract covered workers at only one plant and a master contract covered workers at two or more plants. Of the seventy-nine contracts that covered plants where company or union officials gave initial indications of a willingness to participate, thirty-one were master contracts, and forty-eight were locally negotiated. Sampling all forty-eight plants covered by the locally negotiated contracts and three plants from each of the thirty-one master contracts yielded 141 matched pairs of plants and local unions to be surveyed. After extensive efforts to solicit participation in the survey of company and union officials at these 141 plants, 121 (86 percent of the company officials) and 104 (74 percent) of the local union officials agreed to participate in the survey,

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[1]For a more complete description of the organizational structure of American collective bargaining units, see Chapter 1 of the Technical Appendix. It should be noted that less than one percent of the independent company and directly affiliated local unions had one thousand or more workers covered under individual contracts.

and a questionnaire was mailed to them.[1] Of the 121 questionnaires distributed to company officials, 51 (42 percent) questionnaires were returned sufficiently complete for processing. Of the 104 questionnaires distributed to union officials, 52 (50 percent) usable questionnaires were returned. Thus, the analyses of Survey I are based on information from fifty-one company officials and fifty-two union officials.

The Worker Survey

Survey II, which looks at workers covered by negotiated tuition-aid plans, began with the identification of fifty matched pairs of plants and local unions that had agreed to participate in the first survey.[2] Ten of these fifty plants agreed to participate in Survey II, and 4,241 questionnaires were distributed to the workers in these plants. Response rates ranged from a low of 2.7 percent in one plant to a high of 24.5 percent in another, with an average return rate of 9.3 percent.

In addition to questionnaires distributed to workers in the ten plants drawn from the first survey, 3,600 questionnaires were sent to officials of the United Auto Workers (UAW) at Solidarity House in Detroit, Michigan. These questionnaires were distributed to a sample of workers, henceforth referred to as the UAW sample,

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[1]See Chapter 6 of the Technical Appendix for a list of the questions on the company and union survey forms.

[2]A more complete description of the methodology for this survey appears in Chapter 5 of the Technical Appendix.

at various plants that had negotiated tuition-aid plans as part of collective bargaining agreements with the UAW.[1] Workers completed and returned 629, or 17.5 percent, of these questionnaires.

To summarize, 7,841 questionnaires were distributed in Survey II; 1,023 were returned, including 394 from the ten plants in the NMI sample and 629 from the UAW sample. This provided an overall response rate of 13.1 percent.[2] Of the 970 questionnaires returned in time for processing, 910 were sufficiently complete for inclusion in the study.

Workers in the overall sample of 910 had demographic characteristics similar to those of unionized workers in the nation as a whole.[3] Comparisons between these two groups of workers indicated that 82.4 percent of the sample workers are male compared to 74.7 percent of unionized workers, and 80.6 percent of the sample workers are white compared to 85.9 percent of unionized workers.[4]

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[1]The names and addresses of the plants and local unions included in the sample are contained in Chapter 8 of the Technical Appendix.

[2]A total of 53 of these 1,023 worker questionnaires were returned too late to be included in the data processing.

[3]The Bureau of Labor Statistics provided NMI with figures related to the demographic composition of the unionized labor force in the nation. These unpublished figures are for 1975. No figures are available for age or education.

[4]The figures for the sample workers are adjusted to take into account nonresponses to the questions about sex and race.

The overall sample of 910 workers has slightly higher percentages of males and nonwhites than the population of unionized workers as a whole; nevertheless, the similarities in these percentages suggest that the overall sample of the 910 workers is fairly representative of unionized workers. The overall sample, however, is not composed of a random cross section of workers.

By statistical survey standards, a response rate of 13.1 percent is considered low. Nevertheless, NMI believes that this factor may not be as crucial as it seems initially. Workers were asked to fill out a sixteen-page questionnaire on their own time. Because it was not possible to interview nonrespondents, the reasons for not responding and any biases in the sample cannot be determined. We suspect, however, that a strong correlation between workers' interest in education and tuition-aid and their tendency to complete an extensive questionnaire about education and tuition-aid would be found. In line with this argument, survey returns indicate that approximately 50 percent of survey respondents stated that they were likely or certain to participate in the tuition-aid plan during the next year.

Since a major purpose of this study is to facilitate greater worker participation in tuition-aid plans by removing barriers, targeting reform efforts on the barriers reported by workers interested enough in education to complete a questionnaire about tuition-aid seems reasonable. No attempt has been made to generalize our findings to all workers, but rather to that group of workers who have not used negotiated tuition-aid

funds in the past but who are likely to do so in the future. In other words, our interest is not in the attitudes and perceptions of all workers, but rather of those who would take advantage of their tuition-aid benefits if certain problems and barriers were ameliorated or removed. We believe that these 910 workers comprise a "purposive sample"[1] of unionized workers, and our interpretations of and recommendations from these data are made with this in mind.

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[1]By purposive sample, we refer to a sample of individuals who appear to be responsive to a certain idea or product. In marketing, for example, the testing of a new product does not involve a random sample of people, but rather a sample of individuals who represent potential users of the product. In this study, we are concerned with the potential users of tuition-aid plans, not the general population of workers, and our sample serves this purpose.

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CHAPTER VI

THE FINDINGS

This chapter, which presents some of the key findings from Survey I and II, is divided into two sections.[1] The first section presents the information from company and union officials, and the second reports the findings from the workers in the study. Each section begins with a general description of the data and then provides a detailed analysis and discussion of the barriers to worker participation in tuition-aid and other educational pursuits. In the case of the company and union survey, the discussion of barriers centers on the perceptions of these two groups, while discussion of the workers' survey focuses on "real" barriers reported by the workers themselves. The perceptions of company and union officials can add to our overall understanding of the problem at hand and provide useful information for the design of new programs. It would seem that any increase in participation rates would occur as a consequence of both program changes and changes in worker attitudes and actions.

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[1]Chapters 6 and 7 of the Technical Appendix present the marginal percentages for all questions in the company and union and worker surveys, respectively.

Survey I -- Company and Union Officials

In Chapter V, we discussed the sample of company and union officials. The data reported here are based on the responses of the fifty-one company officials and fifty-two union officials who responded to Survey I.

Information on employee eligibility and course coverage is necessary for a comprehensive understanding of tuition-aid plans. The vast majority of the companies in this study report that their union employees are eligible for tuition reimbursement or prepayment (90.2%). Considerably fewer companies make scholarships (9.8%), loans (15.7%), or paid educational leave (7.8%) available to their union employees.[1] In addition, 11.8 percent of the companies provide some form of educational benefits for family members. Most companies will provide full payment for courses directly related to the employees' current job (82.4%), courses related to job change in the company (78.4%), and courses required for a degree (62.7%). Only 3.9 percent, however, will cover courses not related to any of the above. In addition, whether or not a course is taken for credit affects payment. Credit courses receive full payment from 52.7 percent of the companies, while noncredit courses are covered by only 47.1 percent.[2]

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[1]These percentages add up to more than 100 percent because some plans have more than one type of educational assistance available to workers.

[2]Information about specific eligibility criteria, payment policies, types of educational expenses covered. approval procedures, and budgets and expenditures under the plan is in Chapter 6 of the Technical Appendix.

Previous studies have identified inadequate information about educational benefits as a major inhibitor of worker utilization of tuition-aid and education opportunities (Botsman, 1975; Franklin, 1976; Haynes and Holly, 1978). This study found that, for the most part, companies and unions do very little to publicize their tuition-aid plans. Seventy-seven percent of the companies used bulletin board notices and articles or notices in company papers at least once a year. Unions relied mostly on articles and notices (61.5% at least once a year). Other forms of publicity, including employee handbooks, hand outs, and meetings, were never used by most of the companies and unions.[1]

An understanding of company and union officials' perceptions of the objectives of their negotiated tuition-aid plans and their opinions about the impact of these plans is important in order to gain a general perspective on tuition-aid in the private sector. Exhibit VI-1 presents a graphic comparison of the opinions of company and union officials concerning the objectives of their negotiated tuition-aid plans. The exhibit shows that there is "basic agreement" between companies and unions about the objectives of tuition-aid plans. Both feel that updating knowledge and skills, improving worker performance, and personal development are all important objectives. In addition, companies view preparation for future assignments and, to a lesser degree, conforming

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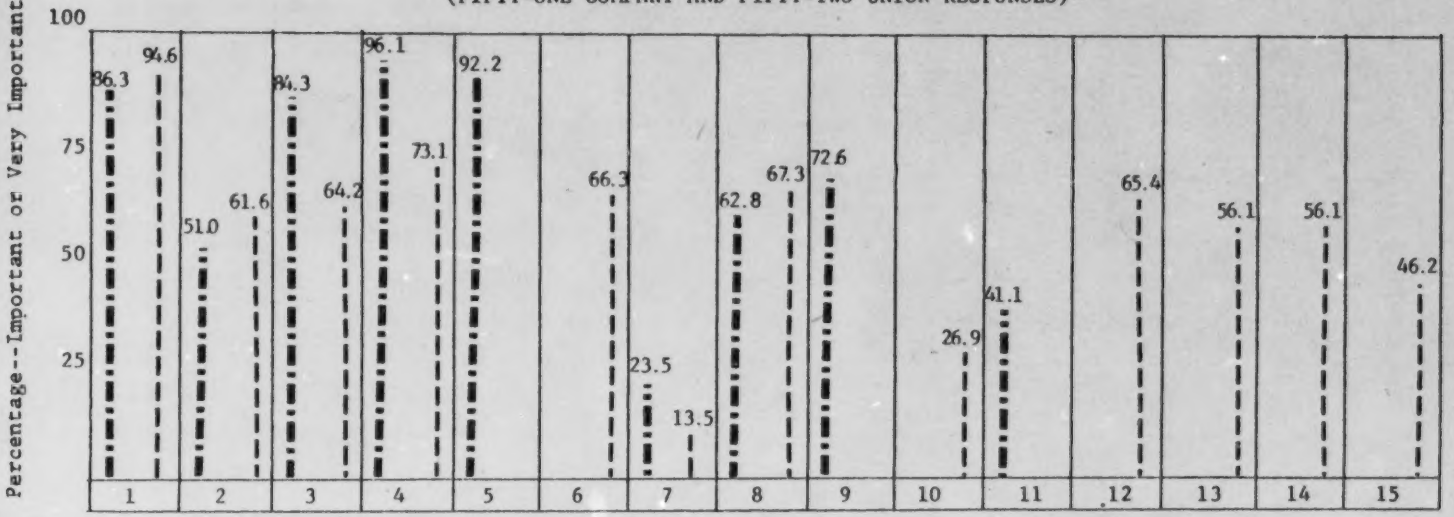
[1]Specific distributions of the frequency of each method of publicity can be found in Chapter 6 of the Technical Appendix.

EXHIBIT VI-1

IMPORTANCE OF OBJECTIVES FOR COMPANY AND UNION OFFICIALS
(FIFTY-ONE COMPANY AND FIFTY-TWO UNION RESPONSES)*



*▬•▬•Company; — — — Union.

1. To update worker knowledge and skills to changing technology
2. To improve workers' basic literacy, mathematics, and language skills
3. To aid workers in their personal development and growth
4. To improve workers' job performance
5. To prepare employees for future assignments with the company
6. To prepare union members for job mobility
7. To improve workers' awareness of civil and community activities
8. To increase benefits to workers
9. To conform to a negotiated agreement
10. To implement national union policies
11. To recruit employees
12. To respond to local membership concerns
13. To increase union members' educational attainments
14. To reduce costs of education to union members
15. To increase effectiveness of union members

to a negotiated agreement as being important objectives. The tendency, then, is for both companies and unions to view tuition-aid as a means of improving the position of workers in terms of their skills, personal development, and future occupational assignments.

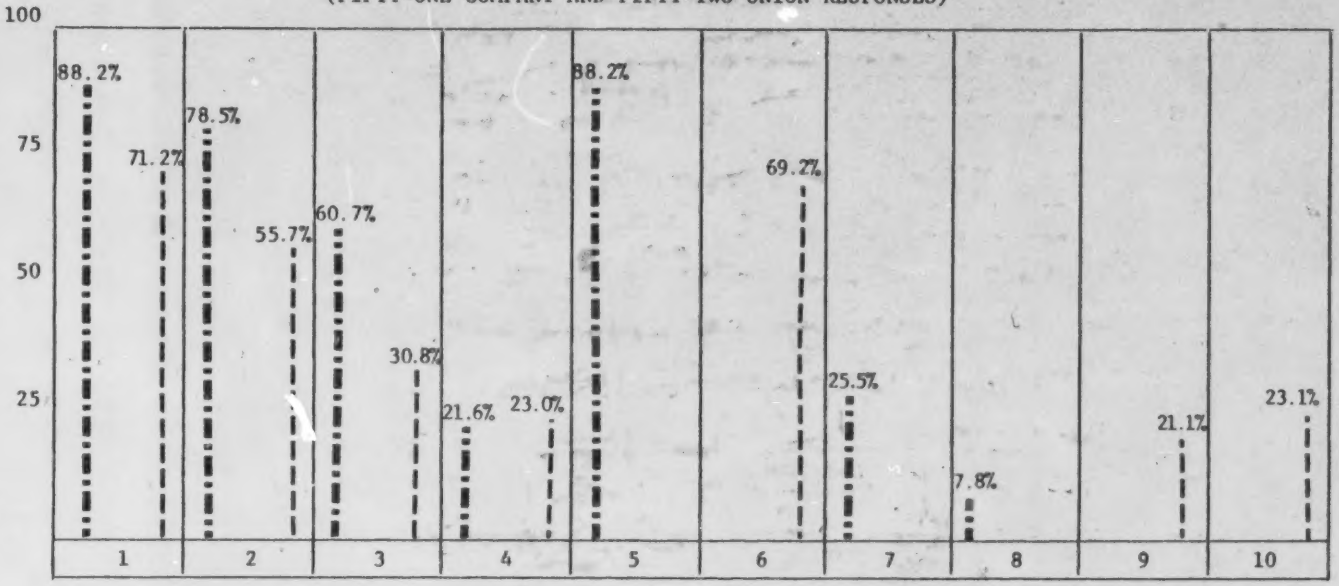
Exhibit VI-2 compares the opinions of company and union officials about the possible impacts of tuition-aid plans. Company and union officials agreed on the three most important areas that tuition-aid plans could affect: worker effectiveness (company 88.2%, union 71.2%), career development and job mobility (company 88.2%, union 69.2%) and job satisfaction (company 78.5%, union 55.7%).

While there is general agreement between company and union officials about the objectives and possible impacts of tuition-aid plans, there are major differences in their perceptions of the barriers to worker participation in these plans. Exhibit VI-3 provides a pictorial comparison of the perceptions of company and union officials about barriers to worker participation. The exhibit presents the percentage of officials reporting at least some negative impact on participation due to a wide array of structural, social, and psychological conditions.

The first observation about this exhibit is that many more union than company officials tend to perceive these conditions as barriers. In fact, only low worker interest is perceived as a barrier by more than half of the company officials (70.6%).

EXHIBIT VI-2

OPINIONS CONCERNING THE IMPACT OF NEGOTIATED TUITION-AID PLANS
(FIFTY-ONE COMPANY AND FIFTY-TWO UNION RESPONSES)*

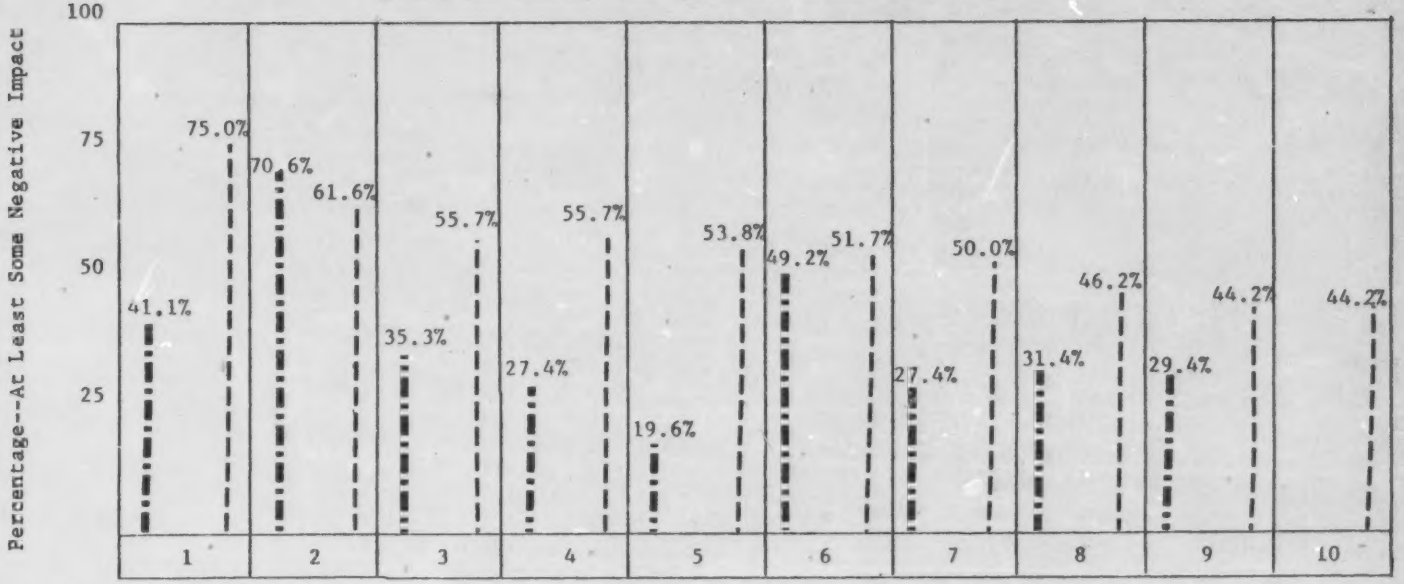


*▪▪▪▪Company; – – – Union.

1. Improved effectiveness of workers on the job
2. Increased worker satisfaction
3. Better union/management relations
4. More worker awareness of civil and community activities
5. More career development
6. More job mobility
7. Lower rate of labor turnover
8. Lower rate of absenteeism
9. Greater member participation in local union
10. Greater member appreciation of national union activities

EXHIBIT VI-3

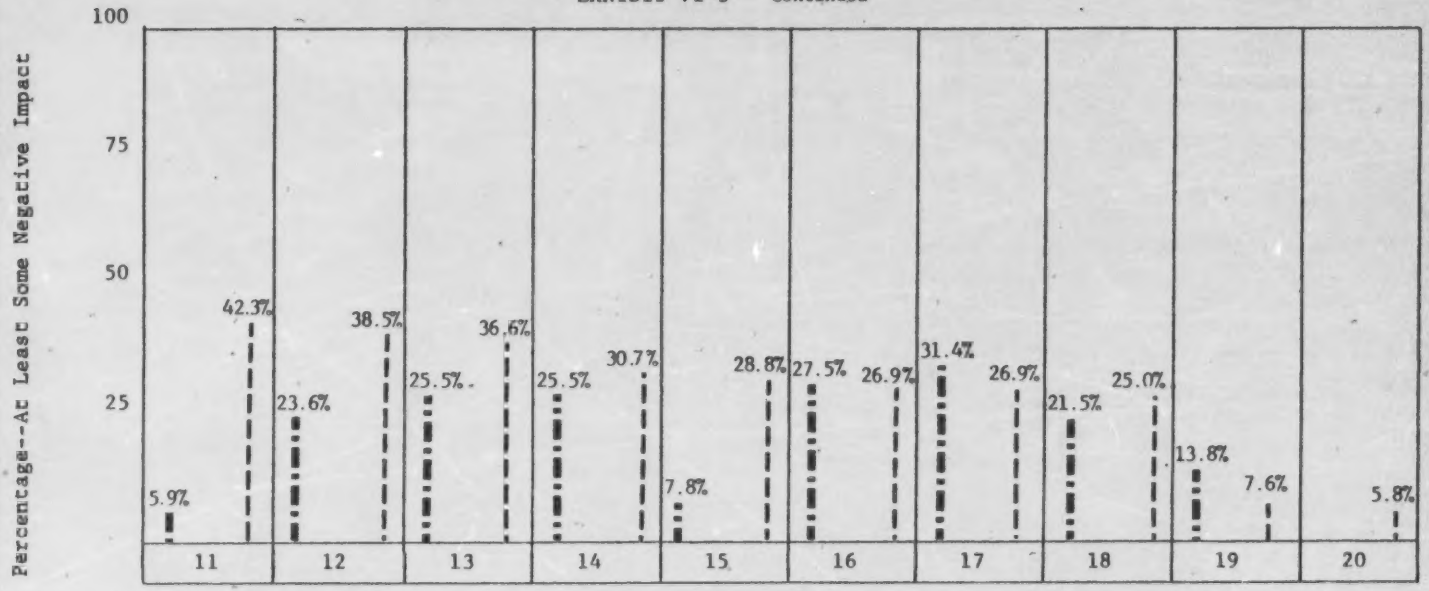
BARRIERS TO WORKER PARTICIPATION IN TUITION AID PLANS AS PERCEIVED BY COMPANY AND UNION OFFICIALS (FIFTY-ONE COMPANY AND FIFTY-TWO UNION RESPONSES)*



*▬·▬·▬· Company; – – – – Union.

1. The company does not give time off or adjust schedules to promote participation.
2. Workers' interest in attending courses on their own time is low.
3. Insufficient incentives are used to reward participants.
4. Management does not encourage participation sufficiently.
5. The range of courses offered by local educational institutions is too limited.
6. Supervisors do not encourage workers/employees under them to participate.
7. Counseling services in the company/union are not sufficient.
8. Workers do not have enough information about the program.
9. Course schedules offered by local educational institutions are not flexible enough.
10. Shop stewards do not encourage workers under them to participate.

EXHIBIT VI-3 - Continued



11. Eligibility criteria in the plan are too restrictive.

12. Support services (child care) are inadequate to give workers enough free time to participate.

13. Workers lack information about educational opportunities in the community.

14. The locations of classes are not convenient for workers.

15. Plan application and approval procedures are too complicated.

16. Workers object to paying income tax on tuition-aid payments.

17. Workers feel inadequate to understand or complete courses that are available.

18. Workers are unwilling or unable to repay the costs of courses.

19. Workers do not participate because of social pressure from other workers.

20. Sex, age, ethnic, or racial discrimination restricts participation.

By comparison, at least half of the union officials identified seven of the conditions as barriers to participation.

For union officials, the most commonly perceived barriers are the inability of workers to take time off or make schedule adjustments (75.0%), low worker interest (70.6%), insufficient incentives (55.7%), and insufficient encouragement by management (55.7%). Generally, union officials view most of the conditions as barriers to worker participation, with the exception of social pressures from other workers (7.6%) and discrimination (5.8%). As stated above, few company officials (between 20% and 30% perceived any of the conditions as barriers to worker participation in tuition-aid plans. Finally, with regard to this exhibit, there are a number of major disagreements between company and union officials in their perceptions of conditions as barriers. There is a 36 percent disparity regarding the restrictiveness of eligibility criteria, a 34 percent disparity regarding time off provisions and limited range of courses offered, and a 28 percent disparity regarding management encouragement.

These findings on the perceptions of company and union officials about barriers to worker participation in tuition-aid seem to reflect the differing goals of each institution. The union officials, who are generally concerned about the low participation rates, perceive a wide array of conditions as barriers. They tend to stress the structural barriers but also perceive a low interest on the part of workers. Company officials, who tend to be interested in company profits and efficiency, point to low

worker interest as the only major barrier. They regard the other conditions as only minor deterrents to increased participation in tuition-aid on the part of workers. The fact that these two groups differ in their perceptions of the barriers to worker participation is an important finding of this study.

This discussion of findings from the company and union officials adds a great deal to the understanding of the nature of negotiated tuition-aid plans in the private sector.

Survey II -- The Workers

This section reports the findings for the 910 workers who provided usable responses to Survey II. The demographic makeup of the sample is as follows:[1] 82.4 percent are males; 80.6 percent are white; 51.7 percent are thirty-four years of age or younger; 59.9 percent had at least some college education; 68.2 percent work on the day shift; 85.0 percent are hourly workers; and 50.1 percent earned less than $15,000 per year. This information provides a general picture of the workers covered in this study.

The distribution of workers in education programs is presented in Exhibit VI-4. The exhibit shows that 51.1 percent of workers participated in some form of education, more than half of whom used tuition-aid benefits for their educational pursuits.

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[1]The specific respondent breakdowns for each of the descriptive variables is provided in Chapter 7 of the Technical Appendix.

EXHIBIT VI-4

DISTRIBUTION OF WORKERS BY THEIR PARTICIPATION IN EDUCATION OF ANY KIND IN THE TWO YEARS PREVIOUS TO FALL 1977[1]

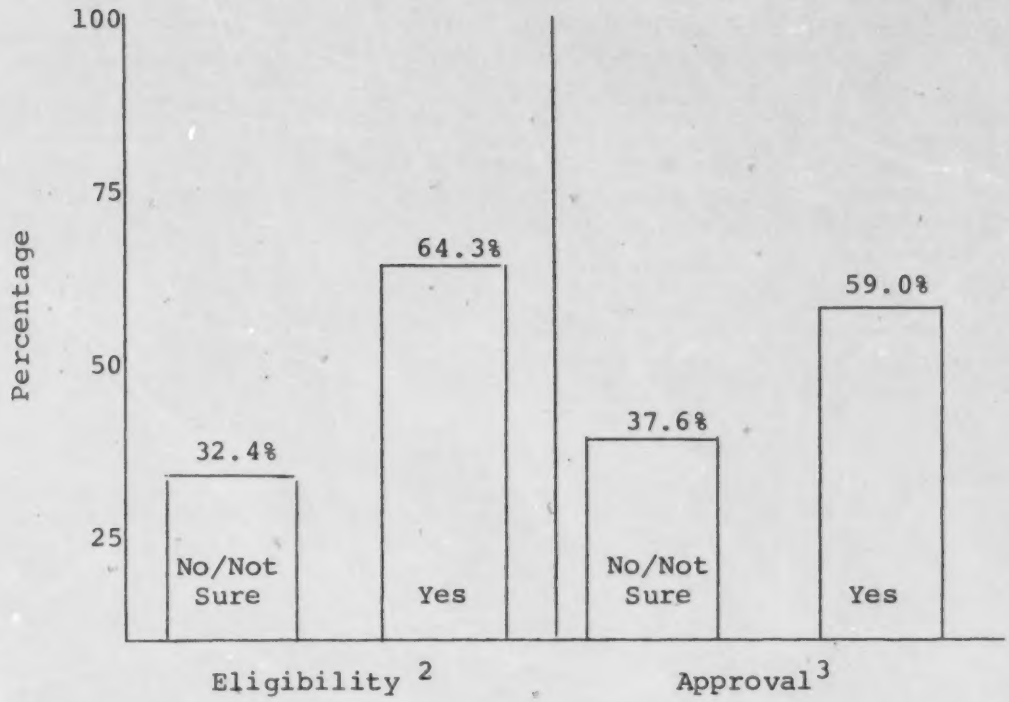
Type of Respondent	Percent of Total Number of Respondents
1) Participants in Negotiated Tuition-Aid Plans	29.5% (268)
2) Participants in Education Who Did Not Utilize Negotiated Tuition-Aid Benefits	21.6% (197)
3) All Participants in Education	51.1% (465)
4) Nonparticipants in Education	48.9% (445)
5) All Respondents	100.0% (910)

Exhibit VI-5 provides data on the knowledge of workers about their eligibility for tuition-aid benefits and about the procedures for course approval. The exhibit shows that about one-third of these workers do not know or are not sure about either their own eligibility or the approval process. Despite the fact that all of those workers were covered under some form of tuition-aid plan, many of the workers were not very knowledgeable about their plans.

[1]The actual numbers of responses are enclosed in parentheses.

EXHIBIT VI-5

WORKER KNOWLEDGE ABOUT ELIGIBILITY AND APPROVAL PROCEDURES[1] (910 WORKERS)



[1]The percentage of nonrespondents is not included in the exhibit.

[2]The question read: "Do you know if you are eligible to take a course under your company's tuition-aid plan that your company and union have negotiated?"

[3]The question read: "Do you know how to go about requesting approval to take a course under the tuition-aid plan?"

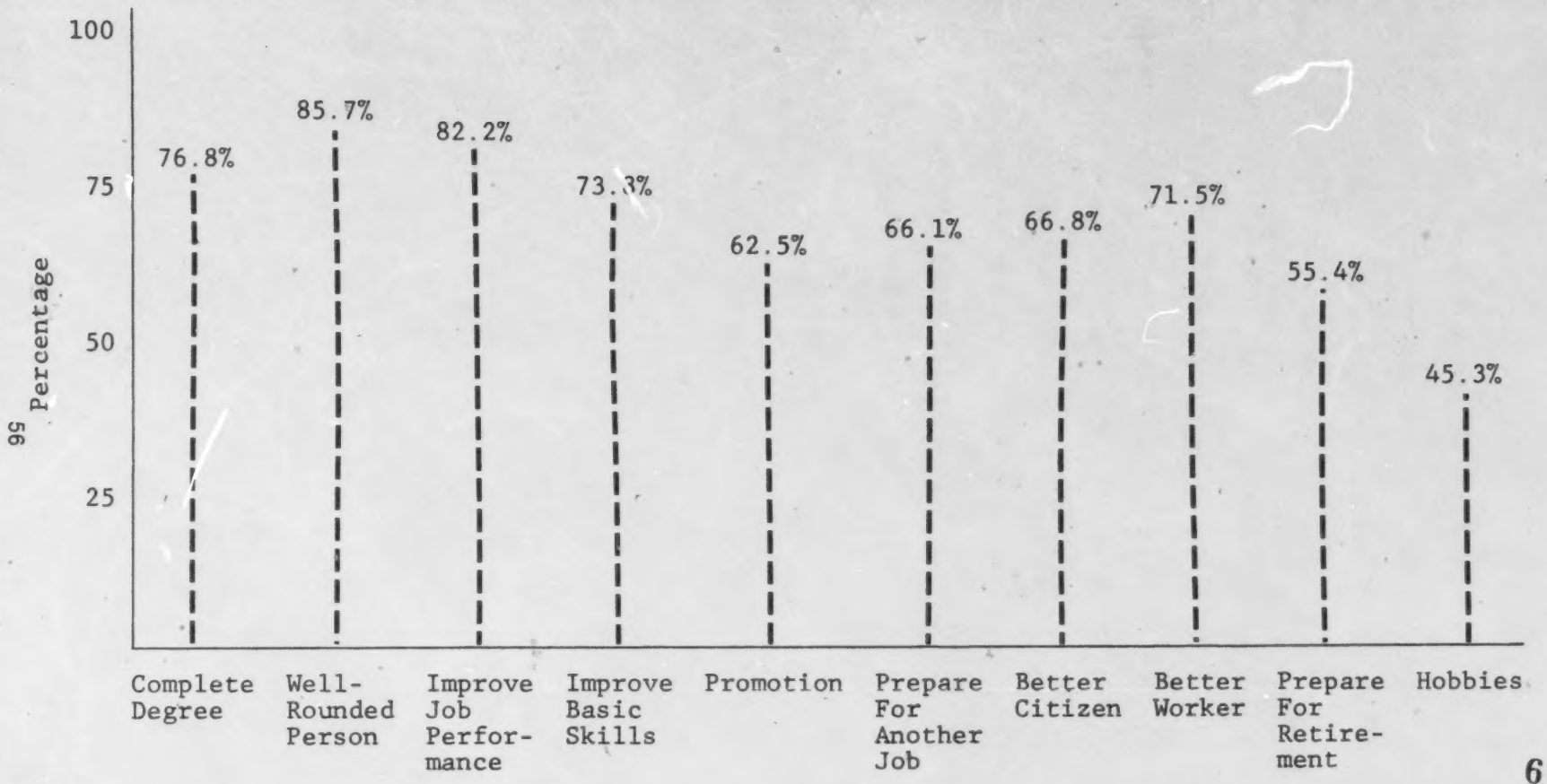
Most workers in this study believe that further education is important. In fact, Exhibit VI-6 shows that a large proportion of workers feel that further education and training are important for everything from improved job performance to being a better citizen and a well-rounded person to preparation for retirement. In assessing the overall implications of this exhibit, one concludes that most workers believe that education and training are important for a large number of diverse reasons.

Exhibit VI-7 reports the chances that workers will use the tuition-aid benefit during the next year. Fifty-one percent of all workers in this study report that they are certain or likely to use the benefit. Twenty percent more participants than non-participants in education report that they are likely or certain to utilize the benefit. In comparing the two groups of education participants, those utilizing tuition-aid plans and those participating in education but not using tuition-aid, we find that 78 percent of the tuition-aid users but only 38.1 percent of the non-users report that they are likely or certain to use the tuition-aid benefit. Overall, this exhibit suggests that a large proportion of all workers, regardless of prior educational participation, feel that they are likely or certain to take advantage of their tuition-aid benefits during the next year.

As we have emphasized throughout this report, the primary purpose of this study is to identify barriers to worker participation and to suggest means of overcoming these barriers. The

EXHIBIT VI-6

WORKER ASSESSMENTS OF THE IMPORTANCE OF VARIOUS OUTCOMES OF FURTHER EDUCATION AND TRAINING[1]
(910 WORKERS)



[1]Percentages represent those workers who responded "important" or "very important" to the question.

EXHIBIT VI-7

CHANCES THAT WORKERS WILL USE THE TUITION-AID BENEFIT DURING THE NEXT YEAR[1]
(910 WORKERS)

Type of Respondent	Not Likely	Likely	Certain	Response Missing
1) Participants in Negotiated Tuition-Aid Plans	20.5% (55)	33.6% (90)	44.4% (119)	1.5% (4)
2) Participants in Education Who Did Not Utilize Negotiated Tuition-Aid Benefits	57.4% (113)	26.4% (52)	11.7% (23)	4.6% (9)
3) All Participants in Education	36.1% (168)	30.5% (142)	30.5% (142)	2.8% (13)
4) Nonparticipants in Education	53.7% (239)	31.9% (142)	8.5% (38)	5.8% (26)
5) All Respondents	44.7% (407)	31.2% (284)	19.8% (180)	4.3% (39)

[1]The actual number of responses are enclosed in parentheses.

discussion that follows presents an analysis of the social, structural, and psychological conditions that affect worker participation in tuition-aid plans. In the discussion, we differentiate between problems related to tuition-aid plans and barriers to worker participation in these plans. Problems are those conditions that a significant percentage of both participants in education and nonparticipants identify as negative.[1] Barriers are conditions that differentiate workers who participate in education from those who do not participate. An example will clarify this distinction. A problem exists if 40 percent of the workers who participate in education and 37 percent of those who do not participate agree or strongly agree about a negative condition. On the other hand, a barrier would exist if 40 percent of nonparticipants and only 20 percent of participants agree or strongly agree about a negative condition. Thus, barriers are conditions that seem to function as deterrents to participation.

Workers report that there are a large number of problems related to tuition-aid plans. These problems relate to the nature of the plans, school and course conditions, personal and family circumstances, and company or union issues. Exhibit VI-8

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[1]More than 25 percent of the workers agreeing or strongly agreeing with a statement is considered significant for these analyses.

provides a rough ordering of these problems and the percentage of all workers reporting that a given condition is a problem.[1,2]

The exhibit shows that course information and a number of company-related issues seem to be the most pressing problems facing all workers. Further, family responsibilities, financial considerations, and school and course conditions also appear to be problematic for a fairly large group of workers. While this exhibit reports summary data, in all cases only minor differences in percentages exist between participants and nonparticipants in education. In the one case, where there is a substantial difference, more participants find the condition to be problem than do nonparticipants. Specifically, 30.9 percent of participants feel that tuition-aid does not pay enough, while only 20.9 percent of nonparticipants feel this way. Since a larger percentage of participants than nonparticipants report this as a problem, it is not considered a barrier to the utilization of tuition-aid.

While none of these problems can be considered a barrier under the conditions we have established, it is important to recognize their existence because they more than likely affect the utilization of tuition-aid benefits by workers.

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[1]Exhibit VI-8 is a summary of more detailed information that appears in Chapter 5 of the Technical Appendix.

[2]Rather than always discussing the agreement or strong agreement of workers about a negative condition, we simply refer to a condition as a problem or a barrier. The percentages reported in the text are derived from a combination of the two response categories "I agree" and "I strongly agree."

EXHIBIT VI-8

CONDITIONS REPORTED AS PROBLEMS BY WORKERS[1]

Condition	Percentage of Workers Agreeing or Strongly Agreeing
My company doesn't give enough encouragement for me to take courses.	56.0%
I don't have enough information about what courses are available.	42.6%
Even if I took some courses, I don't think I'd get promoted or get a better job.	42.6%
My company won't allow me to re-arrange my schedule or take time off to attend classes.	39.5%
Because of family responsibilities, I don't have enough free time	32.9%
The tuition-aid plan does not allow enough variety in the kinds of courses I can take.	32.3%
I am not able to pay in advance for a course even though the company will repay me.	31.9%
Schools don't offer courses at times when I can take them.	29.9%
There is too much company red tape in applying for and getting approval of courses.	27.0%
The tuition-aid plan doesn't pay enough of the cost.	26.0%
My company doesn't really care about the tuition-aid benefits.	25.2%

[1]Percentages are based on 910 workers responding.

There are two demographic characteristics that are associated with worker participation in tuition-aid plans. In addition, two personal attitudes and two structural conditions seem to act as barriers to participation. Each set will be discussed in turn.

Exhibit VI-9 presents the distribution of respondents by education level attained. The exhibit shows that 37.6 percent of all workers had twelve years of education (high school diploma) or less. When we compare participants in education to nonparticipants, however, we see that 57.6 percent of nonparticipants had twelve years of schooling or less compared to only 18.4 percent of participants. This difference of almost 40 percent suggests that there is a strong relationship between prior education and a worker's decision to utilize tuition-aid benefits.

The distribution of workers by age is presented in Exhibit VI-10. It shows that overall, 47 percent of workers are thirty-four years old or younger. For participants in education, the corresponding percentage is 60.2, while for nonparticipants it is 33.3 percent. This difference of almost 27 percent suggests that age, much like prior education, has a strong relationship to the utilization of tuition-aid benefits.

The two personal attitudes that act as barriers to participation do so for only a small number of workers. In Exhibit VI-11, we see that only 6.1 percent of all workers feel they are "too old to go to school." But when participants in education are compared to nonparticipants, we see a difference of 9.1 percent (10.8 percent for nonparticipants and 1.7 percent for participants).

EXHIBIT VI-9

THE DISTRIBUTION OF RESPONDENTS BY THE HIGHEST LEVEL OF EDUCATION ATTAINED[1]

Type of Respondent	Some High School or Less	High School Diploma or GED	Some College but no Associate or Bachelors Degree	Associate Degree	Bachelor Degree or Higher	Response Missing
1) Participants in negotiated tuition-aid plans	3.7% (10)	13.4% (36)	46.3% (124)	14.6% (39)	12.3% (33)	9.7% (26)
2) Participants in education who did not utilize negotiated tuition-aid benefits	3.6% (7)	16.8% (33)	46.7% (92)	18.8% (37)	5.6% (11)	8.6% (17)
3) All participants in education	3.6% (17)	14.8% (69)	46.4% (216)	16.3% (76)	9.5% (44)	9.2% (43)
4) Nonparticipants in education	19.6% (87)	38.0% (169)	26.3% (117)	4.3% (19)	2.9% (13)	9.0% (40)
5) All respondents	11.4% (104)	26.2% (238)	37.7% (343)	10.4% (95)	6.3% (57)	9.1% (83)

[1]The actual numbers of responses are enclosed in parentheses.

EXHIBIT VI-10

THE DISTRIBUTION OF RESPONDENTS BY AGE[1]

Type of Respondent	Under 25	25 to 34	35 to 44	45 to 54	55 and Over	Response Missing
1) Participants in negotiated tuition-aid plans	16.8% (45)	38.4% (103)	23.9% (64)	8.6% (23)	3.0% (8)	9.3% (25)
2) Participants in education who did not utilize negotiated tuition-aid benefits	8.6% (17)	58.4% (115)	17.3% (34)	4.6% (9)	3.0% (6)	8.1% (16)
3) All participants in education	13.3% (62)	46.9% (218)	21.1% (98)	6.9% (32)	3.0% (14)	8.8% (41)
4) Nonparticipants in education	4.5% (20)	28.8% (128)	31.2% (139)	19.6% (87)	6.7% (30)	9.2% (41)
5) All respondents	9.0% (82)	38.0% (346)	26.0% (237)	13.1% (119)	4.8% (44)	9.0% (82)

[1]The actual numbers of responses are enclosed in parentheses.

EXHIBIT VI-11

WORKER AGREEMENT OR DISAGREEMENT WITH THE STATEMENT:
"I'M TOO OLD TO BE GOING TO SCHOOL"[1]

Type of Respondent	I Strongly Disagree	I Disagree	I Have No Feelings Either Way	I Agree	Strongly Agree	Response Missing
1) Participants in negotiated tuition-aid plans	46.6% (125)	39.9% (107)	9.0% (24)	1.5% (4)	0.7% (2)	2.2% (6)
2) Participants in education who did not utilize negotiated tuition-aid benefits	39.1% (77)	42.6% (84)	10.7% (21)	0.5% (1)	0.5% (1)	6.6% (13)
3) All participants in education	43.4% (202)	41.1% (191)	9.7% (45)	1.1% (5)	0.6% (3)	4.1% (19)
4) Nonparticipants in education	26.5% (118)	43.4% (193)	8.8% (39)	6.5% (29)	4.3% (19)	10.6% (47)
5) All respondents	35.2% (320)	42.3% (384)	9.2% (84)	3.7% (34)	2.4% (22)	7.2% (66)

[1]The actual numbers of responses are enclosed in parentheses.

This suggests that for this small group of workers, at least, perceiving oneself as being too old to go to school can be a barrier to utilization.

Exhibit VI-12 shows that 8.8 percent of all workers report that they "do not want to take any more courses." While this percentage is relatively low, the difference in the reports of participants in education and nonparticipants suggests, not surprisingly, that this attitude serves as a barrier to the utilization of tuition-aid benefits. Of the nonparticipants 15.1 percent, compared with only 2.8 percent of the participants, report that they do not want to take any more courses, a difference of 12.3 percent.

Exhibit VI-13 presents information on one of the structural conditions that acts as a barrier to utilization of tuition-aid benefits. The exhibit shows that inadequate program information is a concern for 43.6 percent of all workers. When comparing educational participants to nonparticipants, a difference of 18.4 percent is discovered. Thus, limited information can be a major barrier to the utilization of tuition-aid benefits by workers.

In Exhibit VI-14, we see that counseling is also reported as a concern by a large proportion of workers (50.7% overall). Comparing participants (46.0%) with nonparticipants in education (55.5%) shows a difference of 9.5 percent favoring nonparticipants. This difference suggests that inadequate counseling services may act as a barrier.

EXHIBIT VI-12

WORKER AGREEMENT OR DISAGREEMENT WITH THE STATEMENT:
"I SIMPLY DON'T WANT TO TAKE ANY MORE COURSES"[1]

Type of Respondent	I Strongly Disagree	I Disagree	I Have No Feelings Either Way	I Agree	I Strongly Agree	Response Missing
1) Participants in negotiated tuition-aid plans	40.3% (108)	48.1% (129)	6.3% (17)	1.5% (4)	0.4% (1)	3.4% (9)
2) Participants in education who did not utilize negotiated tuition-aid benefits	42.1% (83)	35.0% (69)	11.7% (23)	4.1% (8)	0.0% (0)	7.1% (14)
3) All participants in education	41.1% (191)	42.6% (198)	8.6% (40)	2.6% (12)	0.2% (1)	4.9% (23)
4) Nonparticipants in education	19.3% (86)	38.9% (173)	15.3% (68)	13.3% (59)	1.8% (8)	11.5% (51)
5) All respondents	30.4% (277)	40.8% (371)	11.9% (108)	7.8% (71)	1.0% (9)	8.1% (74)

[1]The actual numbers of responses are enclosed in parentheses.

EXHIBIT VI-13

WORKER AGREEMENT OR DISAGREEMENT WITH THE STATEMENT "I DON'T HAVE ENOUGH INFORMATION ABOUT THE PROGRAM"[1]

Type of Respondent	I Strongly Disagree	I Disagree	I Have No Feelings Either Way	I Agree	I Strongly Agree	Response Missing
1) Participants in negotiated tuition-aid plans	23.9% (64)	41.4% (111)	9.7% (26)	17.9% (48)	7.1% (19)	0.0% (0)
2) Participants in education who did not utilize negotiated tuition-aid benefits	8.6% (17)	16.8% (33)	19.8% (39)	29.4% (58)	18.3% (36)	7.1% (14)
3) All participants in education	17.4% (81)	31.0% (144)	14.0% (65)	22.8% (106)	11.8% (55)	3.0% (14)
4) Nonparticipants in education	8.5% (38)	21.6% (96)	11.7% (52)	31.7% (141)	21.3% (95)	5.2% (23)
5) All respondents	13.1% (119)	26.4% (240)	12.9% (117)	27.1% (247)	16.5% (150)	4.0% (37)

[1]The actual numbers of responses are enclosed in parentheses.

EXHIBIT VI-14

WORKER AGREEMENT OR DISAGREEMENT WITH THE STATEMENT:
"I DON'T RECEIVE ENOUGH COUNSELING ABOUT AVAILABLE COURSES AND WHETHER I AM QUALIFIED TO TAKE THEM"[1]

Type of Respondent	I Strongly Disagree	I Disagree	I Have No Feelings Either Way	I Agree	I Strongly Agree	Response Missing
1) Participants in negotiated tuition-aid plans	13.4% (36)	31.0% (83)	17.5% (47)	25.0% (67)	11.9% (32)	1.1% (3)
2) Participants in education who did not utilize negotiated tuition-aid benefits	4.6% (9)	13.2% (26)	17.3% (34)	38.1% (75)	20.3% (40)	6.6% (13)
3) All participants in education	9.7% (45)	23.5% (109)	17.4% (81)	30.5% (142)	15.5% (72)	3.4% (16)
4) Nonparticipants in education	5.4% (24)	15.1% (67)	18.2% (81)	35.7% (159)	19.8% (88)	5.8% (26)
5) All respondents	7.6% (69)	19.3% (176)	17.8% (162)	33.1% (301)	17.6% (160)	4.6% (42)

[1]The actual numbers of responses are enclosed in parentheses.

While the two structural conditions discussed above may be the only barriers that can be overcome through program alterations, it seems plausible that any barriers associated with age, educational levels, and worker attitudes can be reduced by improved counseling and information. That is, if counseling services are offered for the first time, or are improved, and more and better information is delivered to all workers, it is possible that older and less well-educated workers may come to realize they too can benefit from additional education or training. The older worker, for example, may come to see education as a means of planning for retirement, while the less well-educated worker may be able to overcome negative feelings about education and learning through counseling.

In the discussion about the problems related to tuition-aid plans and about the barriers to participation, we have compared participants in education with nonparticipants. We are aware that the group of participants in education is made up of users and nonusers of tuition-aid, but we found that the data on these two groups were fairly similar. There are, however, some differences in the perceptions of these two groups, and these are now presented. For only four of the thirty-two negative conditions do tuition-aid users differ, by a relatively large percentage, from non-tuition-aid users.[1] Two of these, information about the plan and counseling, are the structural barriers reported above

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[1]There is a fifth condition that shows a difference, but it favors users over nonusers and therefore cannot be a possible barrier.

(see Exhibits VI-13 and VI-14). Almost 48 percent of participants in education who did not use the tuition-aid benefit report that inadequate information about the plan is a concern, while 25.0 percent of the tuition-aid users so report. This difference of more than 22 percent confirms the previous conclusions that inadequate information about the plan seems to be a barrier to utilization of tuition-aid benefits. With regard to counseling, we find a difference of 21.5 percent between tuition-aid users (36.9%) and nonusers (58.4%). Again, this finding confirms our earlier finding that inadequate counseling may be a barrier to utilization.

The remaining conditions that show differences between tuition-aid users and nonusers are too much company red tape and inadequate information about available courses. Exhibits VI-15 and VI-16 show that for both conditions there is about a 10 percent difference between users of tuition-aid and nonusers. These, then, may also be considered barriers, though clearly they are not as powerful as inadequate information about the plans and inadequate counseling.

This discussion of the worker survey has provided a description of the sample of workers in the study, their demographic makeup, their knowledge about tuition-aid plans, their opinions about education, their problems related to tuition-aid, and the barriers to their using tuition-aid benefits. While all of this information is important for a complete understanding of tuition-aid, one of the most critical aspects of this study concerns the future utilization of tuition-aid benefits by workers

EXHIBIT VI-15

WORKER AGREEMENT OR DISAGREEMENT WITH THE STATEMENT:

"I don't have enough information about what courses are available"[1]

TYPE OF RESPONDENT	I STRONGLY DISAGREE	I DISAGREE	I HAVE NO FEELINGS EITHER WAY	I AGREE	I STRONGLY AGREE	RESPONSE MISSING
1) PARTICIPANTS IN NEGOTIATED TUITION-AID PLANS	23.9% (64)	42.5% (114)	9.3% (25)	14.6% (39)	9.7% (26)	0% (0)
2) PARTICIPANTS IN EDUCATION WHO DID NOT UTILIZE NEGOTIATED TUITION-AID BENEFITS	14.7% (29)	22.3% (44)	13.2% (26)	31.5% (62)	12.2% (24)	6.1% (12)

[1] The actual numbers of responses are enclosed in parentheses.

EXHIBIT VI-16

WORKER AGREEMENT OR DISAGREEMENT WITH THE STATEMENT:

"There is too much company red tape in applying for and getting approval of courses"[1]

TYPE OF RESPONDENT	I STRONGLY DISAGREE	I DISAGREE	I HAVE NO FEELINGS EITHER WAY	I AGREE	I STRONGLY AGREE	RESPONSE MISSING
1) PARTICIPANTS IN NEGOTIATED TUITION-AID PLANS	20.1%	45.1%	14.6%	13.1%	6.0%	1.1%
	(54)	(121)	(39)	(35)	(16)	(3)
2) PARTICIPANTS IN EDUCATION WHO DID NOT UTILIZE NEGOTIATED TUITION-AID BENEFITS	4.1%	16.8%	41.1%	17.8%	12.7%	7.6%
	(8)	(33)	(81)	(35)	(25)	(15)

[1]The actual numbers of responses are enclosed in parentheses.

if the problems or barriers they identify were removed. Exhibit VI-17 presents this data and shows that 68.9 percent of all workers would be likely or certain to utilize the benefits if these problems disappeared. More importantly, 64.7 percent of nonparticipants in education and 70.1 percent of participants who did not use tuition-aid benefits state that they would be likely or certain to utilize these benefits. In other words, if the problems and barriers could be overcome, a very large proportion of all types of workers report that they would utilize their tuition-aid benefits.

EXHIBIT VI-17

WORKER RESPONSE TO THE QUESTION:

"Please think of the most important problem(s) that you have with taking courses under the tuition-aid plan. If these problem(s) disappeared, would you be 'not likely,' 'likely, but not certain,' or 'certain' to take courses under the tuition-aid plan?"[1]

Type of Respondent	Not Likely	Likely, But Not Certain	Certain	Response Missing
1) Participants in negotiated tuition-aid plans	1.5%	20.5%	54.5%	23.5%
	(4)	(55)	(146)	(63)
2) Participants in education who did not utilize negotiated tuition-aid benefits	4.1%	33.0%	37.1%	25.9%
	(8)	(65)	(73)	(51)
3) All participants in education	2.6%	25.8%	47.1%	24.5%
	(12)	(120)	(219)	(114)
4) Nonparticipants in education	12.8%	39.1%	25.6%	22.5%
	(57)	(174)	(114)	(100)
5) All respondents	7.6%	32.3%	36.6%	23.5%
	(69)	(294)	(333)	(214)

[1]The actual numbers of responses are enclosed in parentheses.

CHAPTER VII

SUMMARY AND RECOMMENDATIONS

That tuition-aid in the private sector is an untapped resource for financing the education and training of many adult workers cannot be denied. This study has produced an information base on tuition-aid plans from companies, unions, and workers that is reliable and sufficiently representative to indicate the nature of negotiated tuition-aid in the private sector and the problems and barriers related to its use by workers. The findings from the study provide observations and insights that greatly expand the knowledge base regarding negotiated education and training funds in the private sector.

This chapter provides a summary of the study and a discussion of recommendations for future actions. We have chosen to interweave the major findings of the study with the rationales and supporting evidence for the recommendations being made. The chapter is presented in two sections. The first is concerned with program recommendations, while the second deals with policy recommendations.

Program Recommendations

Negotiated tuition-aid benefits cover a large number of workers throughout the United States. Our conservative estimate

is that 1,600,000 workers are covered under 198 different plans. While tuition-aid was originally conceived as a means to upgrade workers' job-related skills, recent trends suggest that both what is covered and what is considered job- or work-related under tuition-aid plans have expanded. At the same time, company and union officials view tuition-aid in a positive light, with many of these officials believe that there are many important outcomes from worker participation in education and training through tuition-aid plans. A large proportion of workers feel that further education and training is important for a wide range of work- and nonwork-related outcomes, and the workers seem to want to use tuition-aid as the means of acquiring this additional education. The general atmosphere in the private sector, then, seems to be favorable to raising the participation rates of workers in education and training through the increased utilization of negotiated tuition-aid benefits.

There are, however, a number of problems and barriers related to tuition-aid and its utilization which must be recognized, understood, and removed wherever possible. In the course of the study, we came to realize that the principal parties (workers, unions, employees, and educators) know very little about each other's goals, motivations, perceptions, and attitudes. Company and union officials, for example, felt that workers had very little interest in pursuing education when, in fact, workers report a very high interest. To increase this awareness and to improve the chances of success of any program, all of the

principals need to be involved in development and implementation. A "team approach" to program development and operation seems to be appropriate. This type of approach would also respond to several of the company-related problems that workers reported because companies, unions, and workers would be in direct communication with each other about the operation of the program.

Our specific program recommendations fall into three categories: information delivery, counseling, and improving the linkage between the work site and educational providers. Information delivery and counseling are clearly indicated by the data reported earlier, while improved linkage is one way to deliver these services to workers.

Companies and unions do very little to publicize tuition-aid plans, and, as a consequence, a large group of workers do not know about their eligibility and about plan approval procedures. Inadequate information about the plans was identified as one of the two structural conditions that was a barrier to worker utilization. In addition, inadequate course information was a problem for almost half of all workers and was a condition that differentiated participants in education who use tuition-aid from those who did not use the benefit. Delivery of better information, therefore, is important for increasing the utilization of tuition-aid benefits. The information made available to workers should at the very least include information about the nature of tuition-aid plans, education program and course offerings, and available educational and training institutions. In addition, information

on possible career progressions for workers, changes in technology related to workers' jobs, and more general information on the relationship between education and work would benefit a large number of workers. Information and assistance can also be provided to help older and less educated workers overcome their negative perceptions or fears about learning.

Information should be delivered through multiple sources to reach the largest number of workers. Special groups of workers and certain types of information require innovative methods of delivery. For example, the information about course content and teaching styles is best delivered by the educators, while information about "never being too old to learn" may have its greatest impact if delivered by a coworker. The nature of the information and the audience of workers receiving the information should, in part, dictate the most appropriate mode of information delivery.

Inadequate counseling was found to be the other structural barrier to utilization of tuition-aid and one that should be improved through programmatic efforts. Counseling programs should provide both career and personal counseling. Career counseling can provide information to workers about educational offerings, career progressions, or career development and is important for workers who need or want information related to their own work or career directions. Personal counseling is important for special groups of workers (older, less educated) who may perceive themselves as being "too old" or "too dumb" to learn. This type of counseling is important in helping workers overcome the attitudinal barriers they have about schooling and education.

Whenever possible, counseling should take place at the work site. Career-related counseling can be a group activity, and co-workers or other company personnel can be trained to deliver these services. While most personal counseling should be done by a professional counselor, there are group activities and peer-counseling approaches that may be appropriate to the needs of many workers.

Counseling should be available to all workers, and the information provided in the counseling setting should be the best and most accurate available. Since a great deal of information is provided through counseling, information and counseling services are often related. Information, however, can be delivered without counseling, while counseling is dependent, to a large extent, on good information. Any program, therefore, that is trying to improve the utilization of tuition-aid benefits should, at the very least, provide better, more complete information to workers.

We have identified information and counseling as barriers and have suggested that the various parties work cooperatively in any program development activities. Our third program recommendation concerns the linkage between the work site and the educational providers. While most workers view education as beneficial, there are still indications that workers view educational institutions and educators negatively. At the same time, workers need education-related information and counseling. Linking the educational providers to the work site would allow those who have the best information about education to provide it firsthand to workers.

It would also allow educators to counsel workers about educational issues. In addition, it might increase the awareness of each group about the goals, needs, and attitudes of the others.

From the findings of this study, three program recommendations are put forward. The first argues for a new information delivery system to be developed, one that can provide the widest array of information to the largest group of workers while remaining sensitive to the special information needs of certain worker groups. The second recommendation stresses the need for better counseling services. It recognizes the need for career as well as personal counseling in the delivery of information to workers. The final recommendation suggests that the work site and the providers of education be linked more closely, especially in the delivery of information and counseling. Regardless of which recommendation is adopted, it is important that all of the principal parties be involved in the development of the program and its implementation.

Policy Recommendations

A number of policy recommendations can be gleaned from the findings of this study of negotiated tuition-aid in the private sector. We first present the general policy recommendations and follow these with a discussion of the more specific recommendations.

In the course of this study, we became increasingly aware of the limited information available on tuition-aid and other educational opportunities in the private sector. Little is known about

the nature of these opportunities, the amount of money available through these programs, the extent of worker participation in the different types of programs, the quality of the programs, and how these are or can be integrated with public educational opportunities. More attention, then, needs to be given to the study of educational opportunities made available to individuals in the private sector.

Related to this is the need for in-depth study into the attitudes of adult workers about education, their career progression and development, and their life situations. Very little is known about workers, particularly blue-collar workers, and studies need to be undertaken that can add to our knowledge of this large segment of the American population.

A great deal can be learned from the experiences of other countries. Increasing the dialogue between the United States and Europe about lifelong learning, tuition-aid, and recurrent education is also very important for a comprehensive understanding of alternative programs available to adult workers. Studies of the European experience can also increase our awareness of the problems associated with each of the recommended program alternatives.

Our first general policy recommendation then is for additional research in the areas of tuition-aid and educational opportunities for adult workers. The federal government should take the lead in this activity, and our second general policy recommendation speaks to this issue.

Just as there has been a Federal Interagency Panel on Early Childhood Education, and there continues to be a panel on youth, there should also be an interagency panel on labor education. This panel would integrate all of the federal programs related to labor education and the education of working adults, develop a legislative and programmatic perspective on labor education, and generate future initiatives in labor education. At the same time, this panel could consider the possibility of setting up a separate agency to deal with all worker education issues. If, as we suspect, there are programs currently in existence in a number of federal agencies, it may be efficient to integrate these into one agency. One of the first tasks of the Panel on Labor Education would be to make recommendations on the need for and feasibility of having a separate agency on labor education.

Our third recommendation concerns the principal parties involved in initiating or operating tuition-aid plans. While there is basic agreement on objectives, we found some criticism across the parties and some duplication of effort. Also, we found that each party knew very little about the goals, values, and perspectives of the others. Greater collaboration among the principals is needed, both at the local level, where specific programs are developed, and at the national level, where the overarching policies are made.

Our final general recommendation concerns the opinions that the members of society have about unions and management. It is clear that most Americans are very naive about union and

management policies, operations, and their relationships to each other and to the society at large. A better understanding of these issues by all members of society seems important for the general "health and safety" of the country.

A number of specific policy recommendations also emerge from this study. These recommendations are aimed at both federal policy makers and policy makers at the company and union level. They represent specific changes that can be part of legislative decisions at the federal level, negotiations between unions and employers, or company policies. These are recommendations that, in our estimation, would help solve problems related to tuition-aid plans or would help overcome barriers to the utilization of tuition-aid benefits by workers.

The first recommendation is aimed at the federal level, where the Internal Revenue Service has considered any tuition-aid benefit that is not "job-related" to be taxable. Unions and companies perceive this as a barrier to worker participation. There is currently a bill in Congress that makes all such benefits nontaxable. The bill, S.2388, is being sponsored by Senators Packwood, Javits, Nelson, and Moynihan. The recommendation, then. is, as the bill states, to exclude employers' educational assistance from the gross income of employees for tax purposes.

Related to this recommendation is one aimed at companies and their decisions about the courses that are covered under tuition-aid. While the nature of the courses and educational programs covered under tuition-aid has been expanding over the last decade,

there is still a need for some plans to relax the "job-related" requirement or broaden their views of what is considered to be job-related. The expansion of "acceptable" courses or educational programs should increase the number of workers utilizing tuition-aid, particularly those workers who have taken part in some form of educational program without using their tuition-aid benefits.

For a small but significant number of workers, prepayment is an issue. Our recommendation here is to consider prepayment rather than reimbursement as the primary mode of payment to workers. While some workers can afford to be reimbursed for educational costs incurred by them, there is a relatively large number of other workers who are not able to pursue education and training programs because they cannot prepay their tuition. Full prepayment of costs or some form of partial prepayment should be considered.

Our next recommendation concerns scheduling. Companies and educational institutions should investigate ways of making their schedules more flexible to accommodate workers. At the work site, flexitime or other alternative time schemes should be considered. At the same time, video cassettes, institutional television, and other innovative delivery systems should be used to offer educational programs to workers, especially those who work odd hours or night shifts. In addition, educators should increase the number of courses offered at the work site. Offering courses at the work site not only can ease some of the problems of scheduling and

travel, but also means that a worker's classmates will also be coworkers, and this can make the classroom environment less intimidating.

Many workers feel that there should be some tangible incentives associated with additional education and training. We recommend careful consideration of policies that would take this into account in promotions. In addition, the development of career ladders and individual development programs for workers should be explored. Such incentives for workers to participate in education and training could increase utilization of tuition-aid in the short run and improve productivity and worker morale in the long run.

Women and minorities make up a small but growing percentage of unionized workers. Our final policy recommendation is simple, yet very important. Companies, unions, and educators should give special attention to the needs of women and minority workers, in terms of counseling, information, educational programs, and incentives for participating in education or training.

In this study, we found that tuition-aid is available to a large number of workers as part of their negotiated fringe benefits, yet a very small percentage avail themselves of this benefit. This report begins by setting tuition-aid into a broader perspective of adult learning and worker education. Then a conceptual framework is presented which suggests that five principal parties help determine the nature of educational and training opportunities in the work place and the utilization of tuition-aid

benefits by workers. The motivations and roles of society, employers, unions, workers, and educators are delineated, and the process of tuition-aid utilization is identified. Next, a review and synthesis of the literature is provided. This review of pertinent literature on educational benefits to workers, the current scope of tuition-aid, and barriers to worker utilization of educational opportunities puts the current study into perspective. An anlaysis of tuition-aid plans follows the literature review. This analysis identifies four types of plans: tuition advancement/ reimbursement, educational leave, training funds, and scholarships and loans, and it discusses the characteristics of these plans. The study methodology is presented, and the sample of company and union officials and workers is discussed. The findings from each of the surveys are then presented. Company and union perceptions of the objectives of, impact of, and barriers to worker participation in tuition-aid are highlighted. Worker problems with tuition-aid benefits and their barriers to utilization of these benefits are then discussed. Six barriers are described; only counseling and information are structural barriers and removable by programmatic interventions. Recommendations for these program actions are then developed and are followed by a discussion of the general and specific policy recommendations that emerged from the study.

This study has added a great deal to the base of knowledge about negotiated tuition-aid in the private sector. If the information and the recommendations are used by the principal parties involved in the development, operation, and utilization

of tuition-aid plans, then tuition-aid may no longer be an untapped resource.

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GLOSSARY

Accreditation--certification of academic quality determined by a state or national agency.

Active Employees--employees currently working, not on leave or layoff status.

American Federation of Labor and Congress of Industrial Organizations (AFL-CIO)--federation of 190 national/international unions and 142 directly affiliated local unions.

College-Level Examination Program (CLEP)--a national program of credit-by-examination that offers people the opportunity to obtain recognition for college level achievement. Personal reading, on-the-job experience, adult schooling, correspondence courses, or televised or taped courses may have prepared people to earn college credit. CLEP offers two types of tests: general examinations and subject examinations. The material in the general examinations is typical of those portions of the first two years of college which are often referred to as the general or liberal arts education requirement.

Collective Bargaining Agreement--an agreement reached through negotiations between a company and a union specifying wages, hours, and conditions of employment for certain workers at one or more locations.

Directly Affiliated Local Union (DALU)--a local union that is affiliated directly with the AFL-CIO. Unlike other local unions associated with the AFL-CIO, DALU's are not under the jurisdiction of a national/international union.

Educational Loan Plan--a formal arrangement under which an employer lends money to one or more qualified employees for attendance at a college or university, on a full- or part-time basis, in pursuit of a degree.

Employer Contribution--employer payment to a fund that is used to finance employee education and training. Employer payments may be based on a percentage of hourly, daily, or monthly payroll costs or on a fixed dollar amount per worker.

Exempt Employees--salaried employees not paid for overtime.

Hourly Employees--employees paid by the hour for services usually requiring physical labor. Such employees are entitled to overtime pay.

Independent Company Union (ICU)--an unaffiliated local union whose collective bargaining is usually confined to a single establishment, employer, or locality.

Leave of Absence--leave granted a worker for educational purposes for an extended period.

Master Contract--a collective bargaining agreement between a company and a union that covers union members at most or all of that company's locations.

Major Contract--a collective bargaining agreement that covers one thousand or more workers.

National/International Headquarter Union--a labor organization that represents two or more local unions. These unions usually represent workers at more than one company. Individual national/international unions usually represent locals in similar businesses and industries.

Negotiated Tuition-Aid Plan--any formal program through which a company has agreed, within terms of a company-union contract, to pay all or part of the tuition and related financial expenses incurred by employees covered under the agreement while pursuing courses of study offered on or off company or union premises. Tuition-aid plans do not include apprenticeship courses.

Nonexempt Employees--salaried employees paid for overtime.

Salaried Employees--employees paid a fixed amount for services requiring training or special ability. Such employees are not entitled to overtime pay.

Scholarship Plan--a formal arrangement under which an employer provides one or more eligible employees with grants of money to help them attend colleges or universities, on a full-time or part-time basis, in pursuit of a bachelor's degree.

Seniority--a privileged status attained by length of service, usually in a company.

Training Fund--formal funding arrangement in which an employer contributes a fixed amount per employee to finance education and training; some funds involve the establishment of a training institute.

Trustees--company and union representatives responsible for administering negotiated tuition-aid plans or training funds.

Tuition Advancement/Reimbursement Plans--plans that pay all or part of tuition and related costs for enrollment in schools and colleges outside the firm.

Tuition-Aid--any formal plan through which a company offers financial assistance to some or all of its employees to encourage them to complete courses of study at outside educational institutions. Tuition-aid plans are grouped into four types in this study, and each type is considered to have specific provisions such as an application and approval process. These four types of plans are: tuition advancement/reimbursement plans; educational leave and leave of absence plans; training fund plans; and scholarship and educational loan plans.

Veteran Employees--ex-military personnel who receive governmental aid for education and training. Employer-paid tuition-aid is usually adjusted to supplement and not duplicate governmental aid that veterans receive.

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